MARYLAND JUDICIARY

GEARS

General Enterprise And Resource Support

INV210 Managing Inventory

Last Revised: May 28, 2013

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INV210

INV210 Managing Inventory

Course Overview
Every Inventory system has several basic requirements that must be met in order to effectively manage inventory. The system must have a way to receive material from vendors, to put the material in stock, and to issue material to specific users who need the material. Finally, the system must have a way to make adjustments to the on-hand records when those adjustments become necessary. The GEARS system supports all of these functions.

The lessons in this course will show you how to enter inventory transactions into the system and to update inventory information within the system when necessary.

The *IN210 Managing Inventory* course is intended for the District Course Warehouse for the management of forms within their warehouse.

Course Outline
The following sections and lessons provide information and step-by-step instructions on all the functions that are necessary to manage Inventory.

- Course Audience and Prerequisites
- Lesson 1: Creating and Updating Bin Locations
- Lesson 2: Using Express Putaway
- Lesson 3: Using Express Issue
- Lesson 4: Making Inventory Adjustments
- Lesson 5: Using Delivered Reports
- Lesson 6: Using the Replenishment Functionality
- Course Summary

Course Audience and Prerequisites

Audience
The Judiciary audiences for this course are:

- District Court Warehouse

GEARS Role
This course is intended for Judiciary employees with the following GEARS role(s):

- IN Inventory Analyst

Prerequisites
The recommended prerequisites for this course are:

- INT100 Introduction to GEARS
- INV100 Understanding GEARS Inventory

Lesson 1: Creating and Updating Bin Locations

Lesson Overview
Items that are stored in the warehouse must be able to be located when they are needed for use. GEARS uses a location naming convention that allows the system to maintain a record indicating where specific items are stored.

Before the system can be used, the Bin Locations must be set-up. Location data can be relatively dynamic. As a result, GEARS provides a way to modify Bin Locations over time.

Lesson Objectives
After completing this lesson, you will be able to:

- Understand the concept of Bin Locations as it is used at the Judiciary
- Create or add a Bin Location
- Modify an existing Bin Location

1.1 Maintaining Bin Locations

Before the system can be used, the Bin Locations must be set-up. Location data can be relatively dynamic. As a result, GEARS provides a way to modify Bin Locations over time.

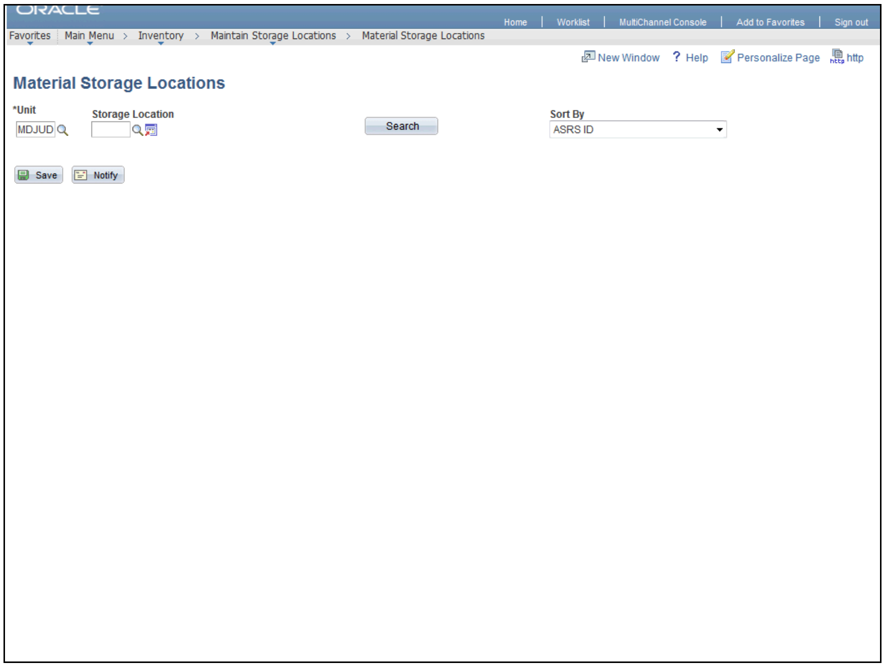
After completing this topic, you will be able to:

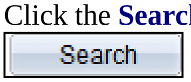
- Create and update bin locations

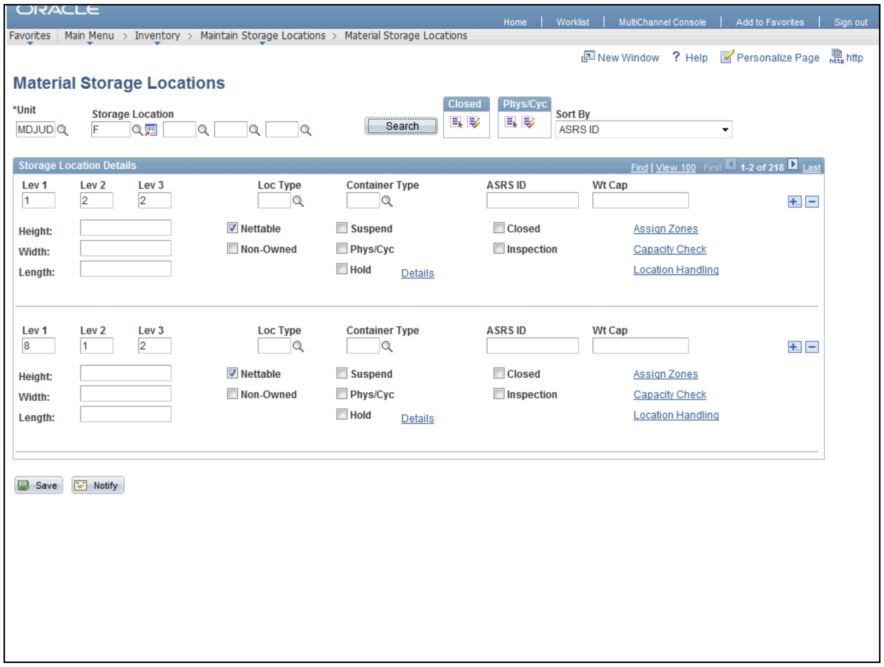
Procedure

In this topic, you will learn how to maintain bin locations and information.

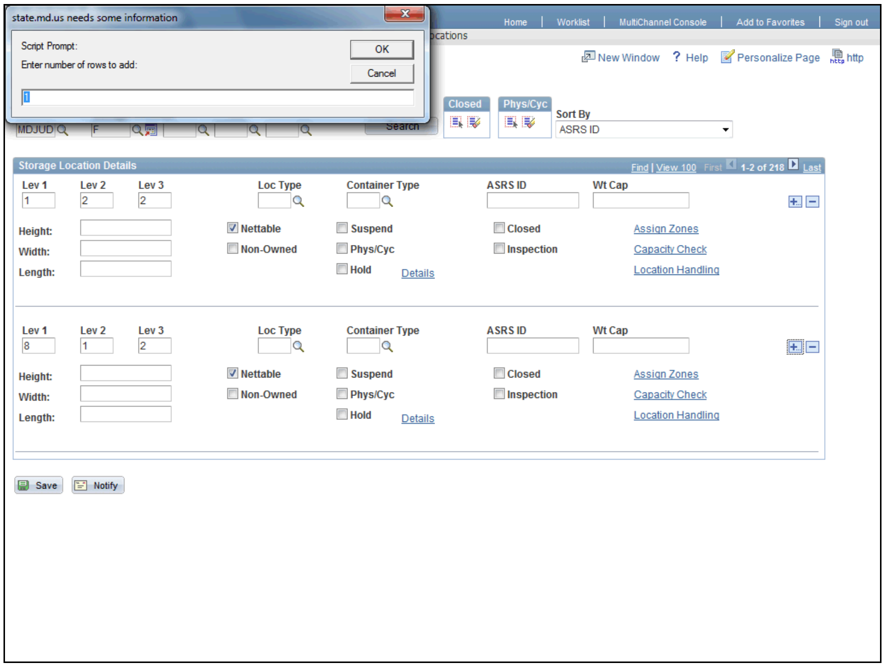
Step	Action
1.	Begin by navigating to the **Material Storage Locations** page. Click the **Main Menu** button. Main Menu
2.	Click the **Inventory** menu. Inventory
3.	Click the **Maintain Storage Locations** menu. Maintain Storage Locations
4.	Click the **Material Storage Locations** menu. Material Storage Locations

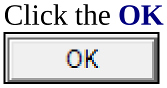


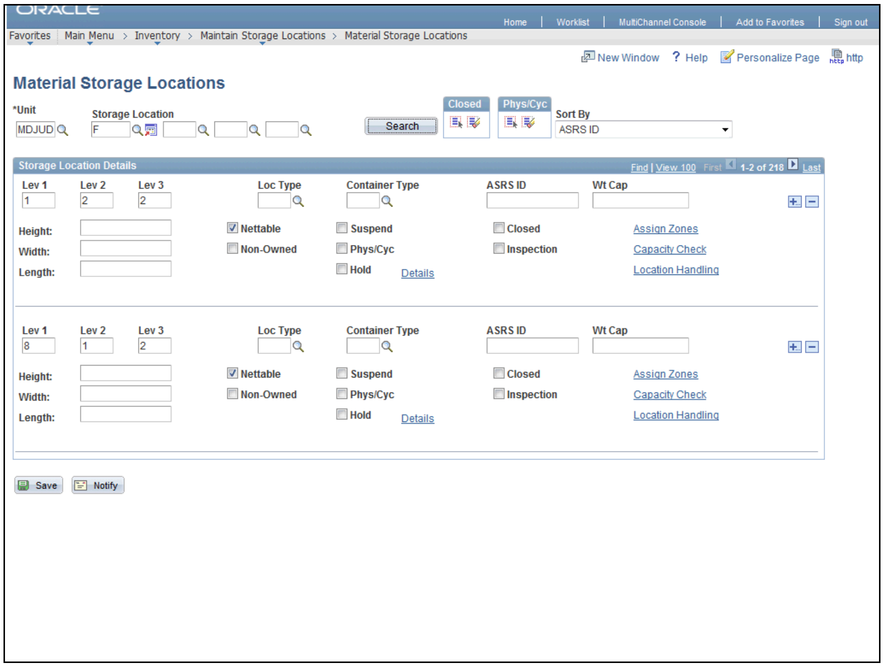
Step	Action
5.	The **Material Storage Locations** search page displays. You enter the first value of the Storage Location (i.e.,. the Aisle) into this block. The system will use your inputs to search for all available locations that are in the specified Aisle. As soon as you move the cursor off the input box, the system will display additional boxes where you can enter additional location detail. In this example, we are using "F" but the actual value you use depends upon your specific location. Enter the desired information into the **Storage Location** field. Enter "**F**".
6.	You can add as much detail to the location input boxes before clicking on the Search icon but you are not required to add any additional information. Click the **Search** button. 

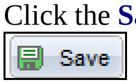


Step	Action
7.	The system will display the details for all locations that meet your input criteria. The locations will be displayed in order. In this example, there are no locations between F 1 2 2 and F 8 1 2. In order to add or delete storage locations, click on the 'Plus' or Minus' Icons. Clicking on the 'Plus' Icon will insert a new Location below the current row. When adding locations, you simply adds rows then edit the data to reflect the new location being added then click 'Save'. Clicking on the 'Minus' Icon will delete the Location displayed on the current row. The Location is deleted when the page is saved. If you leave this page without saving it, your additions or deletions will not be made. It is very important to make sure that you save the page. Click the **Add multiple new rows at row 2 (Alt+7)** button. 



Step	Action
8.	You must enter a number into this block. Your entry will usually be "1". If you are adding several locations, the system will allow you to create several blank rows at once as a convenience. For example, you could enter 2 here and the system would create 2 blank rows. After you adjust the values on both of those rows, you could click the Save button and the system would save both new locations. This feature only applies when you are adding new locations. Click the **OK** button. 
9.	When adding new storage locations, enter the appropriate values into the location boxes.



Step	Action
10.	When you are finished making your entries and you click the Save button, the system will perform a series of checks to insure that the location can be added or deleted. If the system determines that the action would cause a problem, it will display an appropriate message and the action will not be saved. For example, the system will not allow you to delete a location if material is currently stored there. The entries you have made will be lost unless you click the Save button. Click the **Save** button. 
11.	You have successfully completed the *Maintaining Bin Locations* topic. You have learned how to: - Add new bin locations - Enter required location information on the **Material Storage Locations** page. **End of Procedure.**

Lesson 2: Using Express Putaway

Lesson Overview

The Personnel at the District Court Warehouse must be able to receive material from external Vendors and from the Print Shop. Once materials have been received, warehouse personnel need to be able to update the on-hand balances to reflect the receipts.

Lesson Objectives:

After completing this lesson, you will be able to:

- Receive an item from an external Vendor
- Receive an item from the Print Shop.
- Perform an inventory transaction that will cause the inventory records to accurately reflect the on-hand balances.

2.1 Receiving Items Against a PO

The process described in this topic will be used to receive items against a Purchase Order.

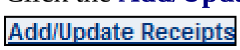
After completing this topic, you will be able to:

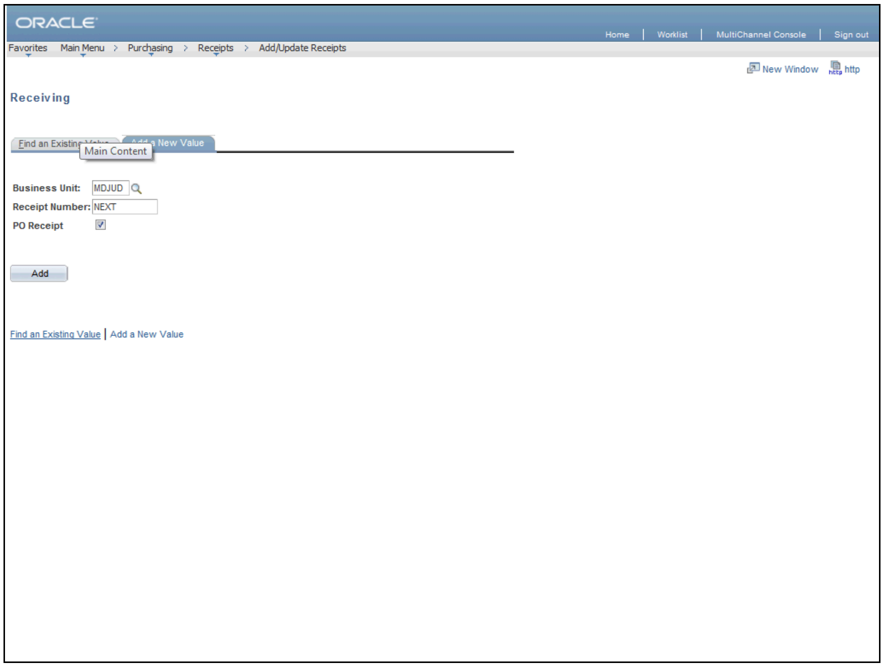
- Process Items that were received against a PO

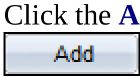
Procedure

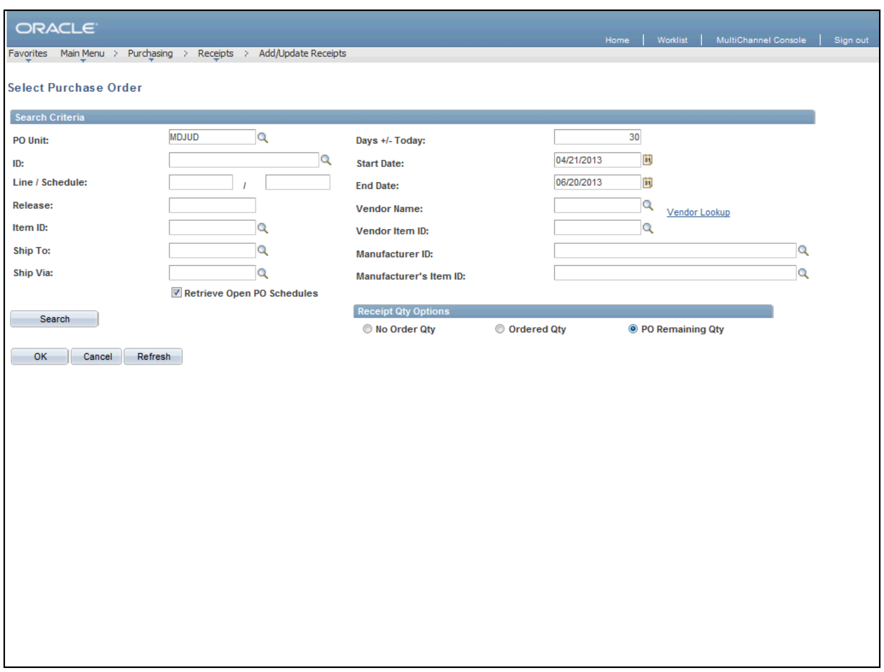
This topic covers the process that makes material that was received from outside Vendors available for use in the warehouse.

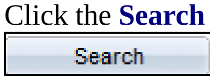
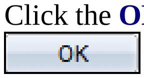
This is actually a 2 step process. This topic covers the receipt from the Vendor. The next topic will cover the Putaway.

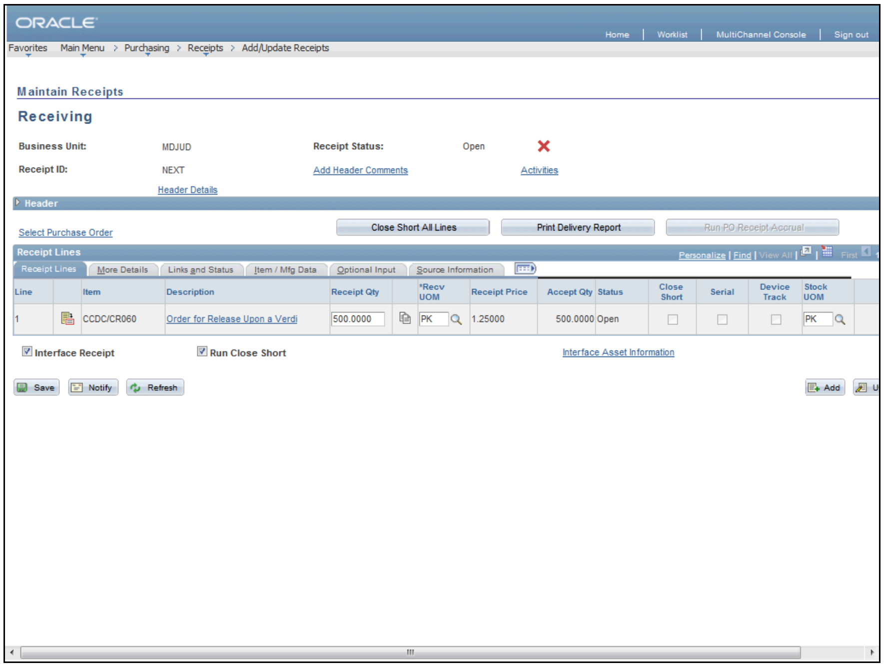
Step	Action
1.	Begin by navigating to the **Select Purchase Order** page. Click the **Purchasing** link. 
2.	Click the **Receipts** link. 
3.	Click the **Add/Update Receipts** link. 



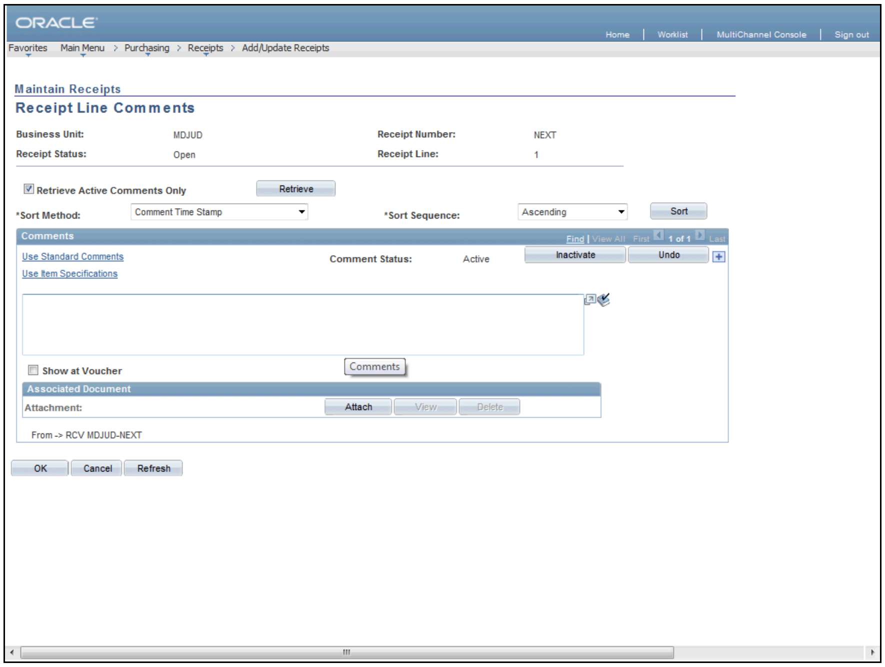
Step	Action
4.	The **Receiving - Add a New Value** page displays. Click the **Add** button. 

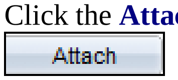


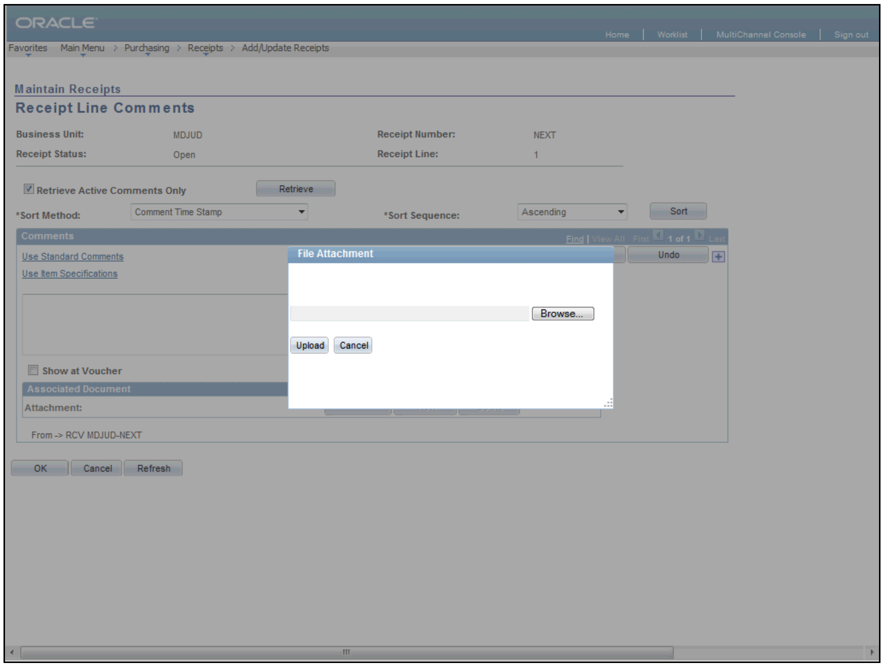
Step	Action
5.	The **Select Purchase Order** page displays. Make sure the **PO Remaining Qty** Radio Button is checked. Click the **PO Remaining Qty** option if it is unchecked. 
6.	You should receive a Packing List with the shipment. Enter the PO Number from the Packing List into the ID field. Make sure that all other fields in the Search Criteria area are blank. In the example shown, the PO number on the Packing List was 0000000149. **Note: the leading zeros in the PO Number are important. The PO Number field is expecting 10 characters counting the leading zeroes.** If you do not receive a Packing List, you will have to search for the appropriate PO Number using other search criteria. In that case, the Vendor Name would be the best field to use. Click the **Search** button. 
7.	The system will display all the lines on the PO Entered that have a remaining quantity due. In the case shown here, the PO only has one line eligible to be received. In production, it is likely that more than one line will be displayed. Select all the lines on the PO that you want to receive by clicking the **Sel** option on each line. 
8.	Click the **OK** button. 

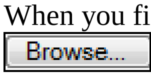
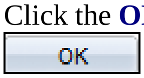


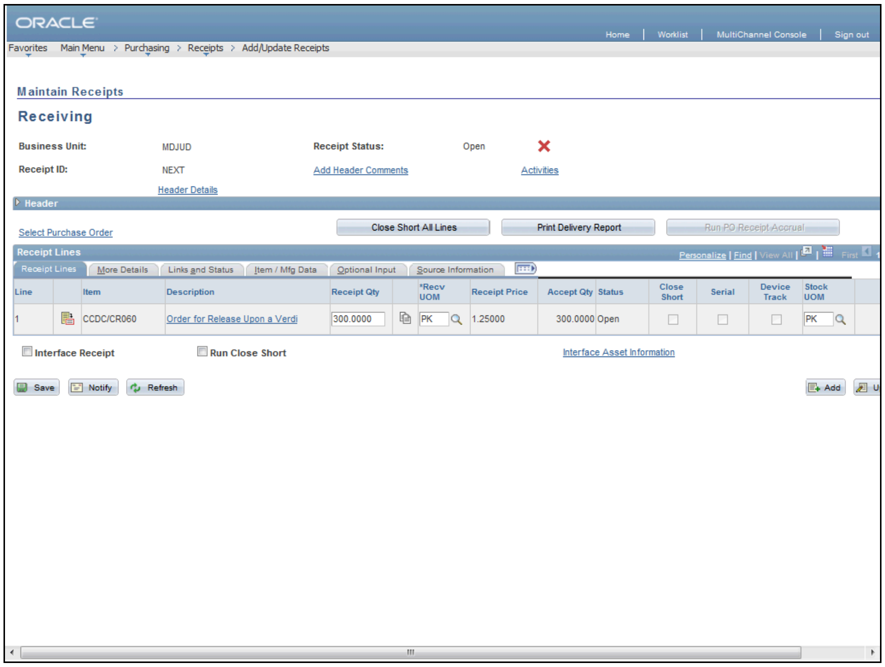
Step	Action
9.	The **Maintain Receipts - Receiving** page displays. The Receipt Quantity field will display the quantity that remains open for each line. If the quantity received is less than the open quantity (if the vendor has shipped a partial shipment), you can change the quantity to reflect the quantity that was actually received. Enter the desired information into the **Receipt Qty** field. Enter "**300**" for this instance.
10.	Click the **Interface Receipt** option so it is unchecked. Interface Receipt
11.	Click the **Run Close Short** option so it is unchecked. Run Close Short
12.	Make sure the **Interface Receipt** and **Run Close** boxes are not checked then click the **Links and Status** tab. Links and Status
13.	Click the **Comments** button.



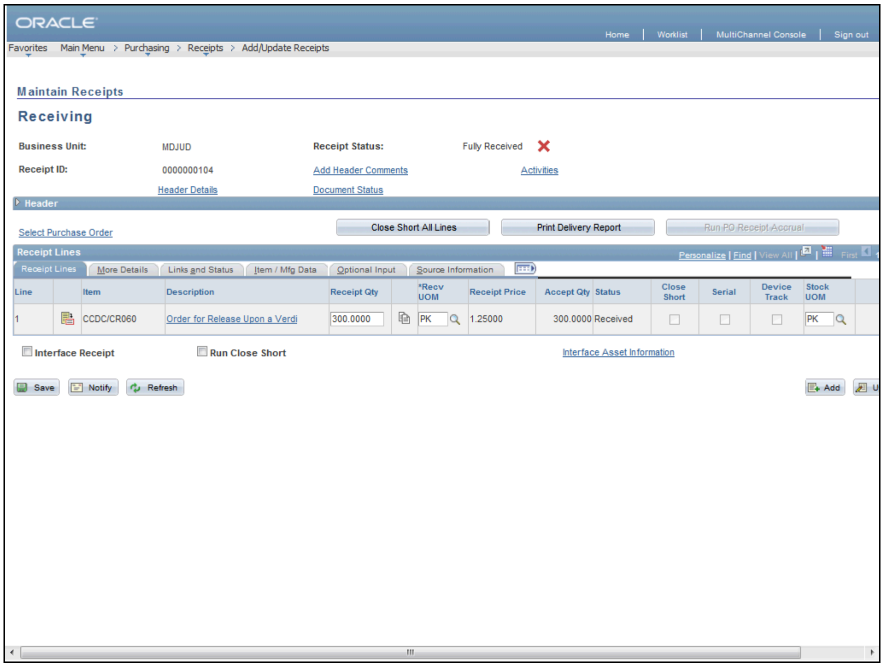
Step	Action
14.	The **Maintain Receipts - Receipt Line Comments** page displays. This is where you can attach an electronic copy of the Packing List to the receipt if a Packing List was received with the shipment. Before doing this, you should have scanned the Packing List and saved it onto your computer. Click the **Attach** button. 



Step	Action
15.	Click the **Browse** button and find the file name that you created when you scanned and saved the Packing List. When you find the file name, click on it. 
16.	After you have selected the file, the system will display the file name on this page. Click the **Upload** button. 
17.	The system will display the name of the file that you have attached on this page. At this point, the file is saved within the GEARS System and does not depend upon the file that is saved on your machine. The locally stored file can be moved or deleted now without causing any harm. Click the **OK** button. 



Step	Action
18.	The **Maintain Receipts - Receiving** page displays once again. After you have repeated this process for every PO line that you are receiving against, then click the **Save** button. 



Step	Action
19.	The system will assign the next sequential **Receipt ID** to the Receipt you have just saved. In this case, the **Receipt ID** is **0000000104**. Additionally, the **Receipt Status** will be changed to "**Fully Received**".
20.	You have successfully completed the *Receiving Items Against a PO* topic. You have learned how to: - Process items that were received against a PO. **End of Procedure.**

2.2 Performing an Express Putaway

The process described in this topic will be used to putaway items into the warehouse. If an item is received from an outside Vendor, the receipt must be processed first (see Lesson 2.1). If the item was produced in the AOC Print Shop, there is no PO to receive against and this is the only step necessary to get those items into stock.

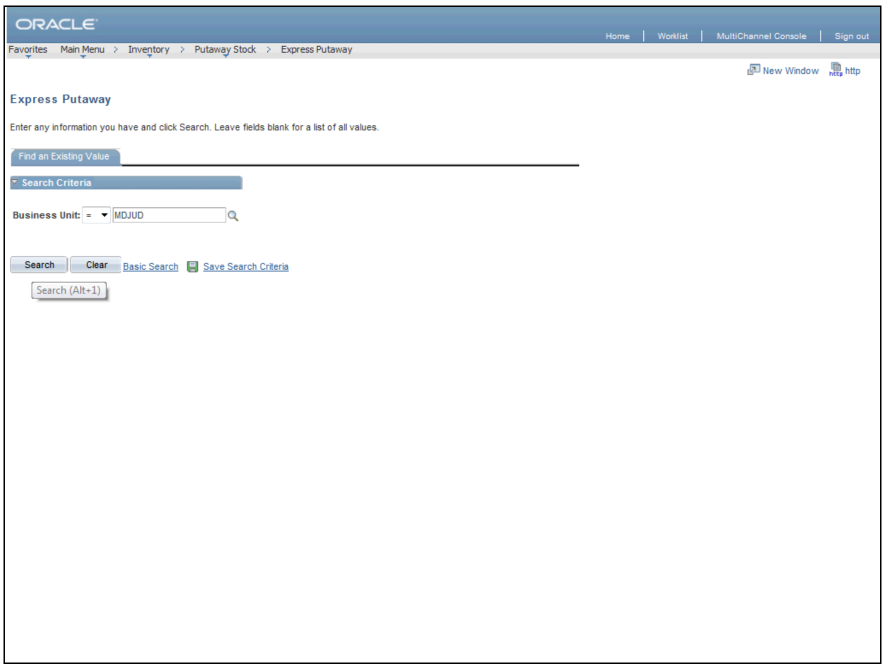
After completing this topic, you will be able to:

- Process Items into stock. This includes items that were received against a PO as well as items that were produced in the AOC Print Shop.

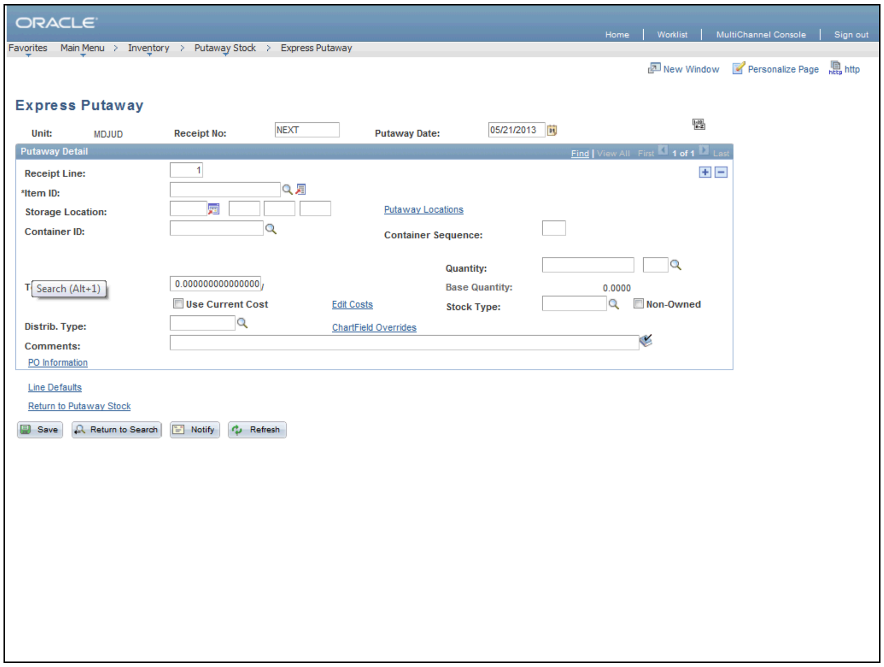
Procedure

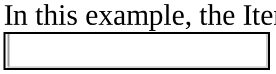
This topic will cover how to perform an Express Putaway.

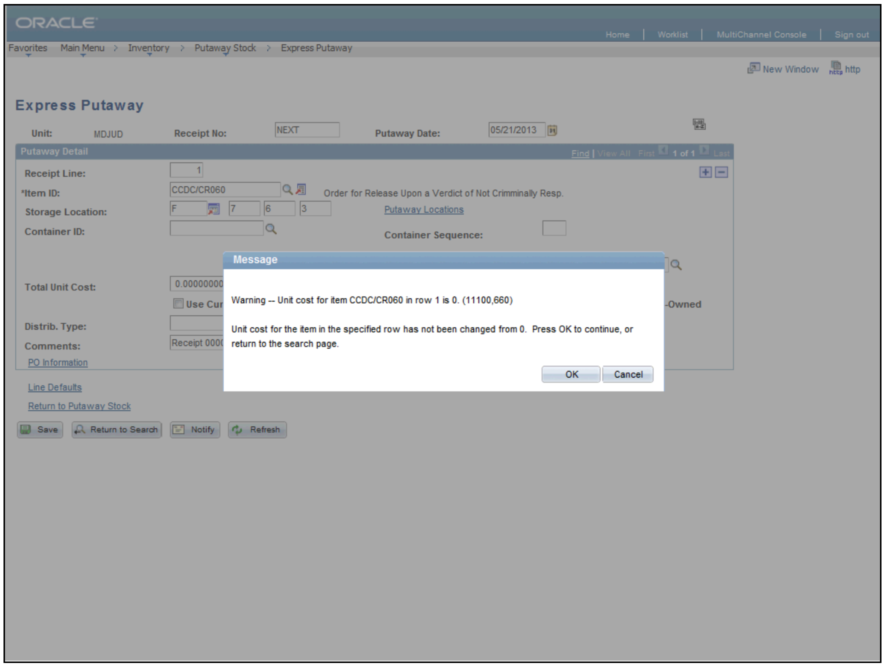
Step	Action
1.	Navigate to the **Express Putaway** page. Click the **Inventory** link. Inventory
2.	Click the **Putaway Stock** link. Putaway Stock
3.	Click the **Express Putaway** link. Express Putaway

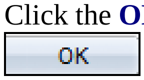


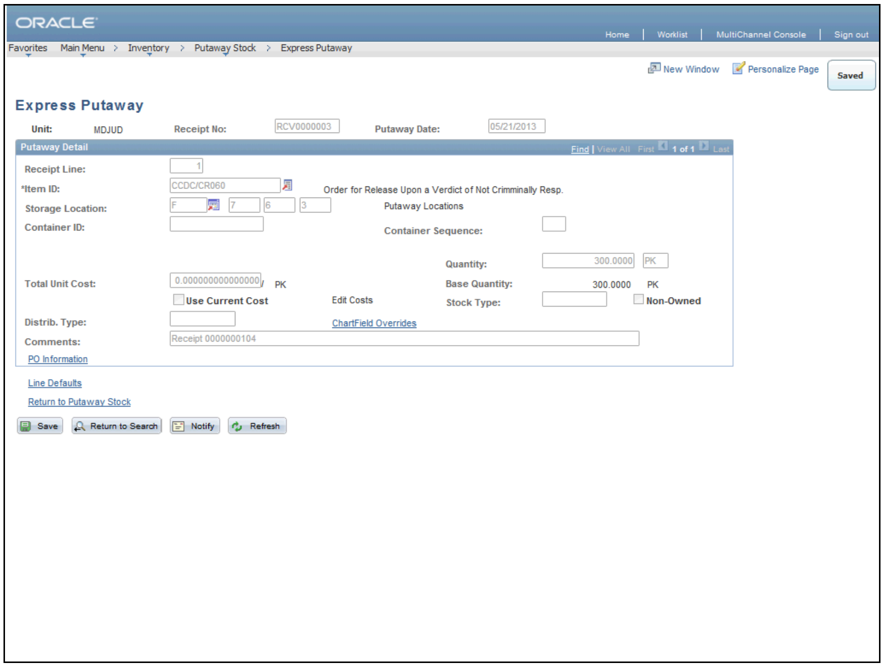
Step	Action
4.	The **Express Putaway** search page displays. Click the **Search** button. Search



Step	Action
5.	The **Express Putaway** page displays. Enter the AOC Item Number for the Item that is to be Putaway. In this example, the Item Number is **CCDC/CR060**. 
6.	Enter the Quantity that is being put into inventory into the **Quantity** field. Enter "**300**" for this example.
7.	Enter the appropriate Unit of Measure into the UOM field. You can also select it using the Search Icon. Enter "**PK**".
8.	Enter additional information into the **Comments** field. If the Putaway corresponds to a Receipt against a PO, put the Receiver ID here. If the Putaway is for an item that was produced in the AOC Print Shop, then put 'Received from AOC Print Shop' here. This field is for 'information only'. The system will continue to function if this data is not entered. Enter "**Receipt 0000000104**".
9.	Click the **Save** button. 



Step	Action
10.	AOC is not tracking the cost of inventory items using the GEARS system. As a result, there is no need to enter any dollar amount on the Express Putaway and this message box will always be displayed when the page is saved. Click the **OK** button. 



Step	Action
11.	The system will assign a Receiver Number for the Putaway and will display it here after you save it. Write down/record this number, as it can be helpful for future processing.
12.	You have successfully completed the **Performing an Express Putaway** topic. You have learned how to: - Perform an Express Putaway **End of Procedure.**

Lesson 3: Using Express Issue

Lesson Overview:
The Express Issue functionality in GEARS is the preferred method to record material issues at the Judiciary. This method is quick and easy and does not require the printing of a Pick Ticket, nor does it require the Picking Feedback step. No computer programs have to be run in order for the inventory records to be adjusted.

Lesson Objective:
In this lesson, you will learn how to:

- Use Express Issue to record Issue Transactions

3.1 Using Express Issue

GEARS has several methods that can be used to issue material from the warehouse. The easiest and most basic method is called "Express Issue'. This method is the easiest to use and meets all the needs of the Judiciary. Express Issue will be described in this training document.

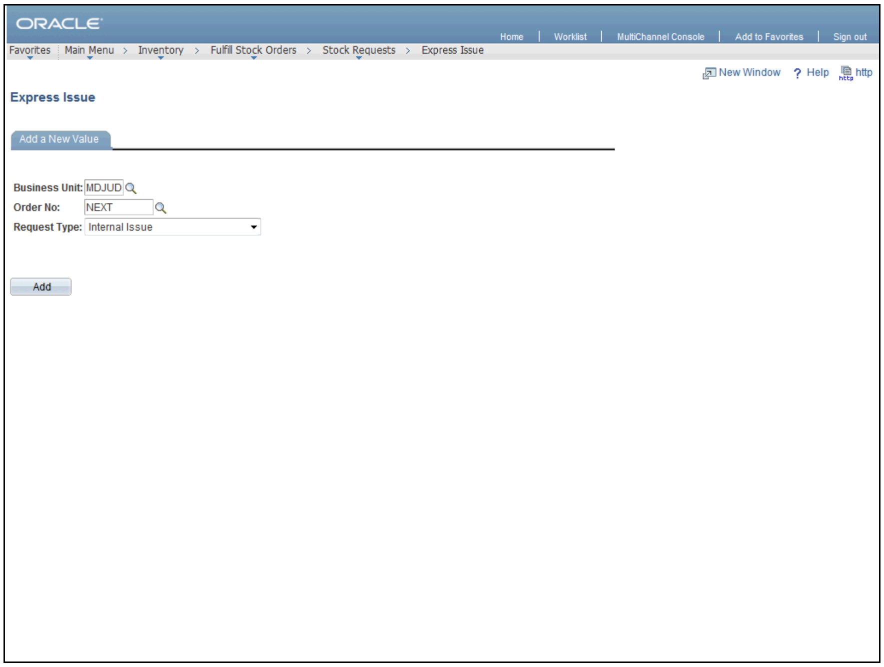
After completing this topic, you will be able to:

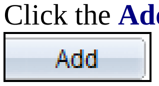
- Use Express Issue to issue material from the warehouse

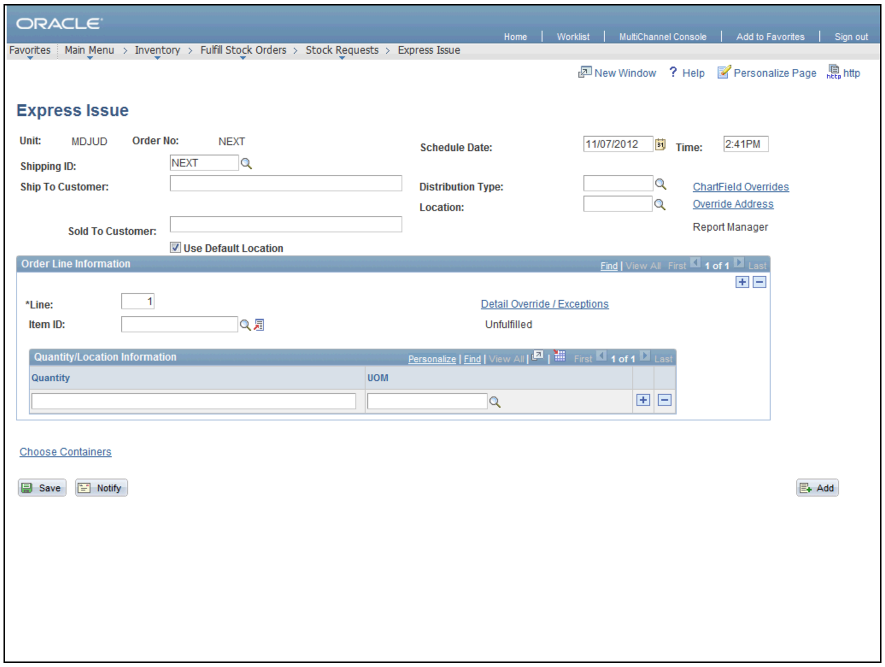
Procedure

In this topic, you will learn how to use Express Issue when issuing material from a warehouse.

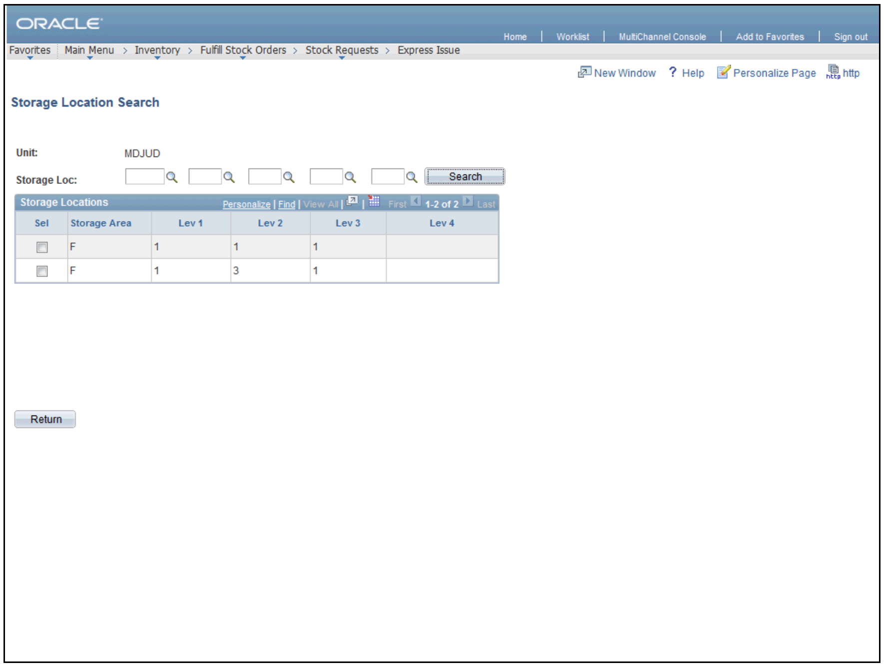
Step	Action
1.	Begin by navigating to the **Express Issue** page. Click the **Main Menu** button. Main Menu
2.	Click the **Inventory** menu. Inventory
3.	Click the **Fulfill Stock Orders** menu. Fulfill Stock Orders
4.	Click the **Stock Requests** menu. Stock Requests
5.	Click the **Express Issue** menu. Express Issue



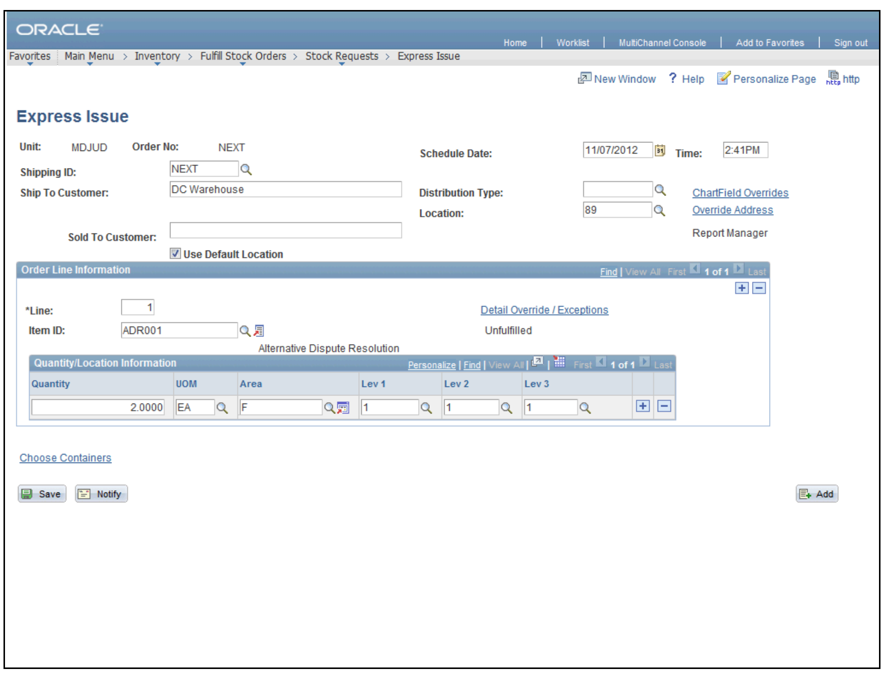
Step	Action
6.	The **Express Issue** search page displays. Make sure the Order No = **NEXT** and the Request Type = **Internal Issue**. Click the **Add** button. 



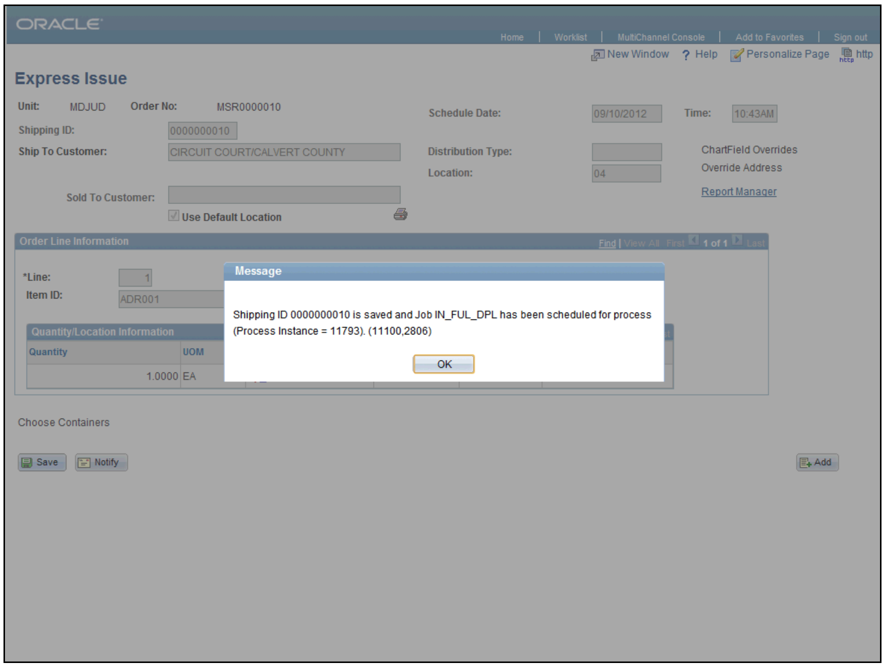
Step	Action
7.	Enter the desired information into the **Location** field. Enter "**89**".
8.	Enter the desired information into the **Item ID** field. Enter "**ADR001**".
9.	Enter the desired information into the **Quantity** field. Enter "**2**".
10.	Enter the desired information into the **Area** field. Enter "**F**".
11.	Click the **Storage Location Search** button. 



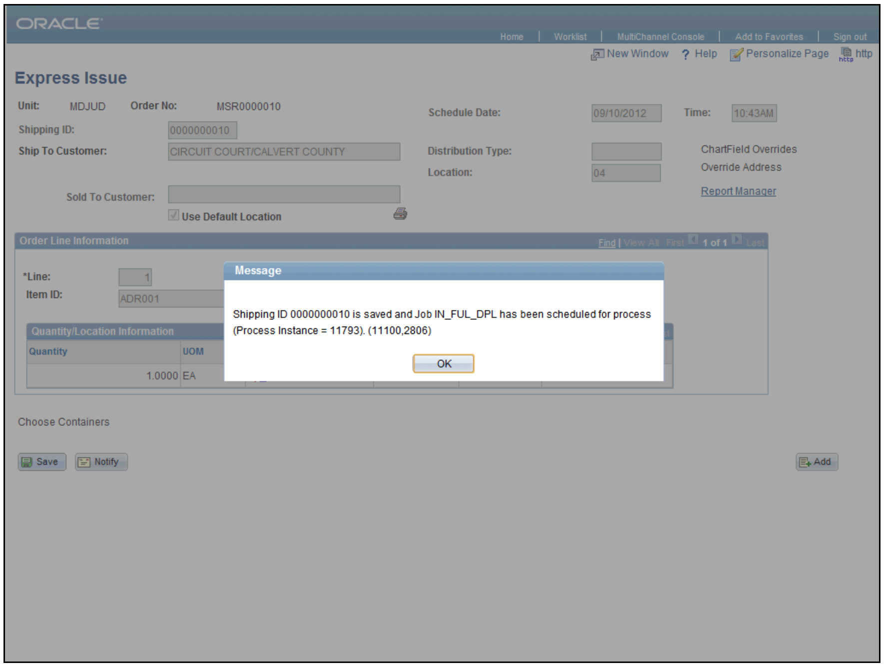
Step	Action
12.	In the **Storage Locations** section, click the **Sel** option for the first row.
13.	Click the **Return** button. Return



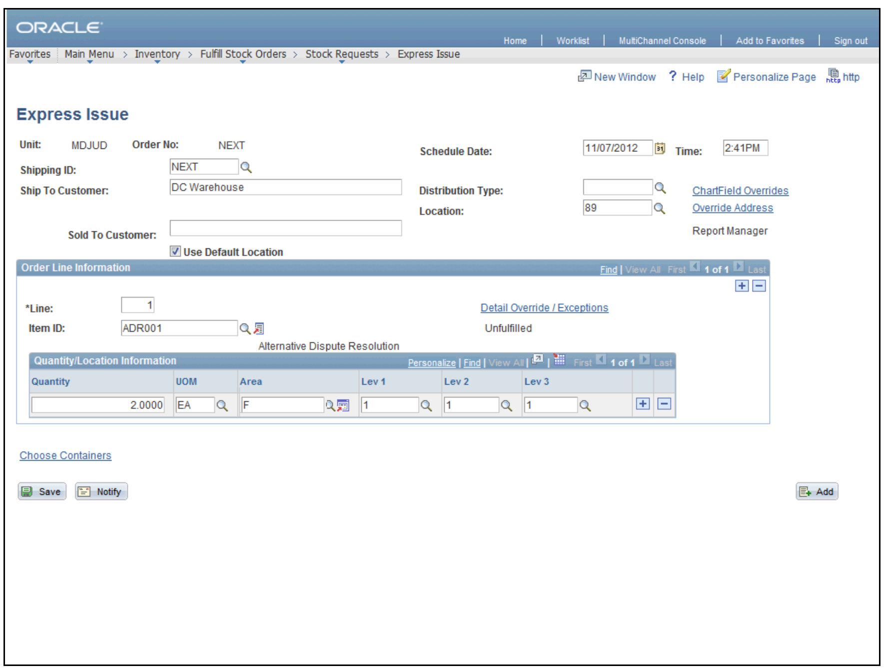
Step	Action
14.	Click the **Save** button. 



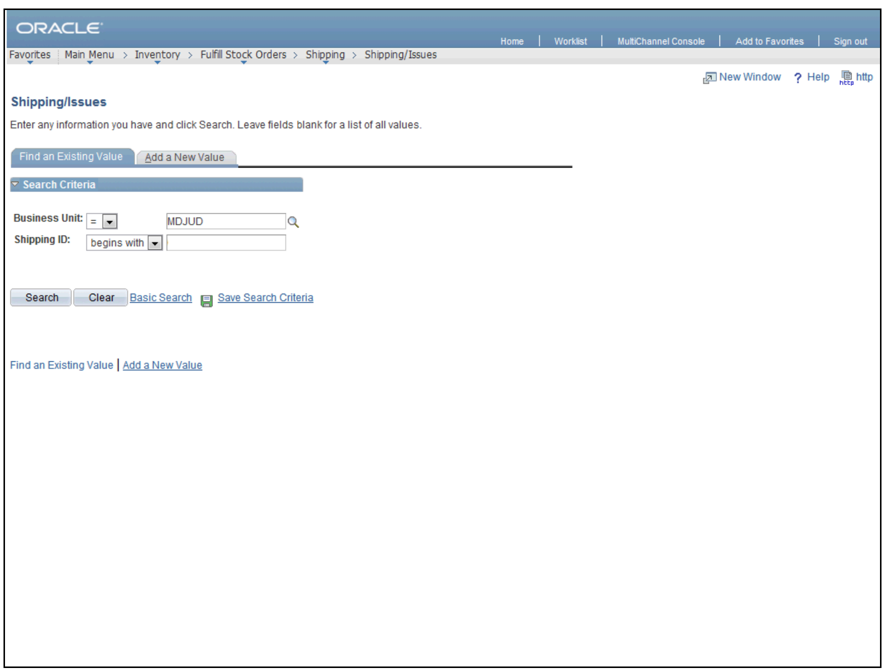
Step	Action
15.	Record the Shipping ID for future searches.



Step	Action
16.	Click the **OK** button.

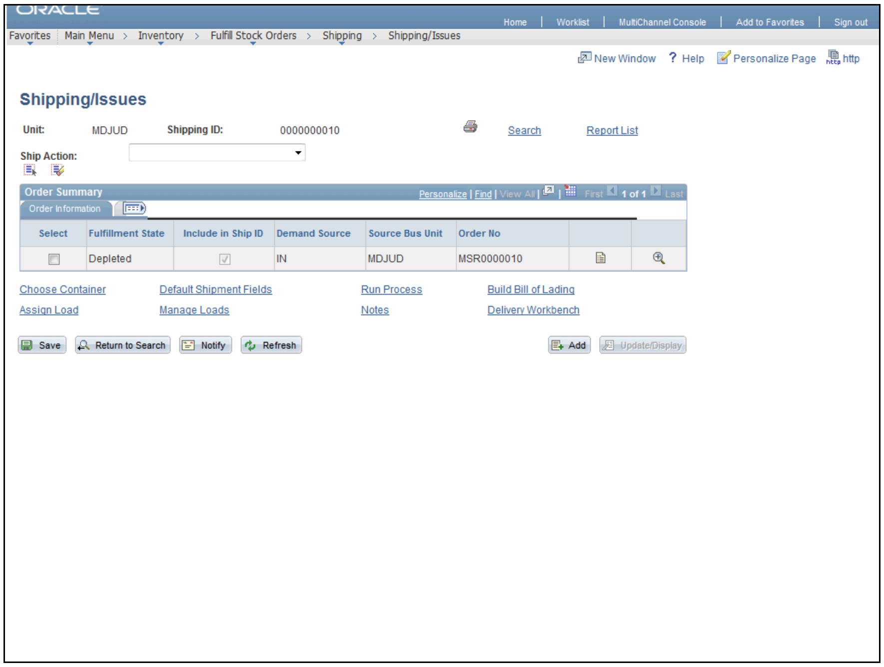


Step	Action
17.	Next, you will enter the form control numbers for the Shipping ID just created. This step is only necessary for forms that are controlled by individual numbers. Click the **Home** link. Home
18.	Click the **Main Menu** button. Main Menu
19.	Click the **Inventory** menu. Inventory
20.	Click the **Fulfill Stock Orders** menu. Fulfill Stock Orders
21.	Click the **Shipping** menu. Shipping
22.	Click the **Shipping/Issues** menu. Shipping/Issues

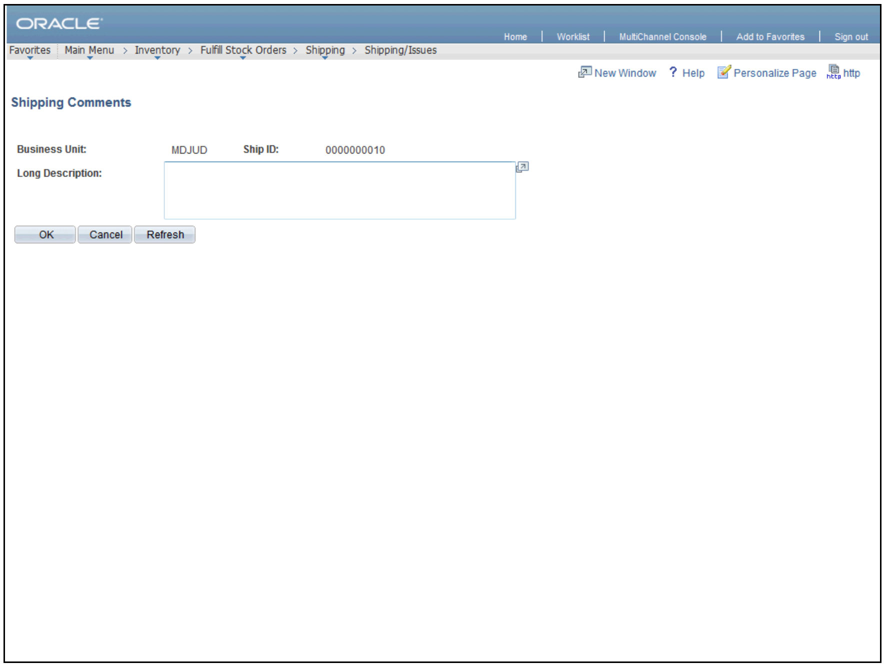


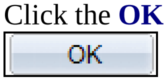
Step	Action
23.	The **Shipping/Issues** search page displays. Enter the desired information into the **Shipping ID** field. Enter "**0000000010**".

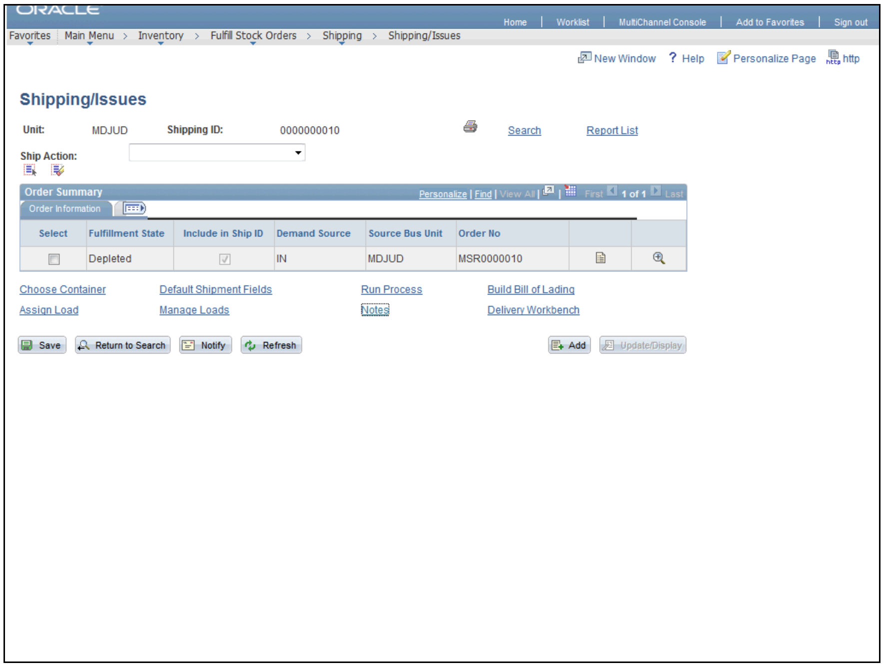
Step	Action
24.	Click the **Search** button. Search



Step	Action
25.	The **Shipping/Issues** page displays. Click the **Notes** hyperlink to enter the range of control numbers. Notes



Step	Action
26.	The **Shipping Comments** page will allow you to provide some historical tracking for Control Numbers and can be used during audits. Enter the desired information into the **Long Description** field. Enter "**Control numbers 1 - 2**".
27.	Click the **OK** button. 



Step	Action
28.	Click the **Save** button. 
29.	The shipping issues information has been updated with control numbers.
30.	You have successfully completed the *Using Express Issue* topic. You have learned how to: - Use the Express Issue functionality **End of Procedure.**

Lesson 4: Making Inventory Adjustments

Lesson Overview:
Cycle Counting is an important capability because it allows an organization to maintain highly reliable inventory records. The GEARS system provides users with the ability to adjust the quantity on-hand in the system to match the actual quantity on-hand in the shelves in the warehouse.

When entering the Adjustment, the system allows the user to record a reason for the adjustment as well as a comment explaining it. The reason and explanatory comment is expected to be very helpful when the inventory is being audited because it provides an audit trail.

Lesson Objective:
In this lesson you will learn how to:

- Enter inventory adjustments to correct on-hand balance errors

4.1 Making Inventory Adjustments

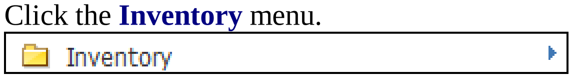
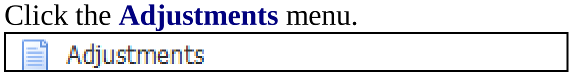
The GEARS system provides users with the ability to adjust the quantity on-hand in the system to match the actual quantity on-hand in the shelves in the warehouse.

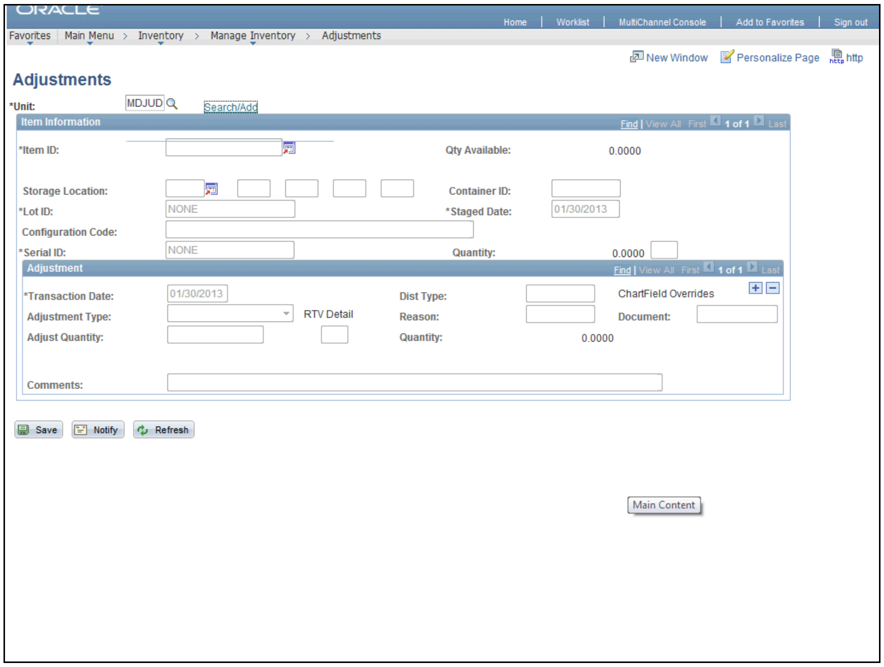
After completing this topic, you will be able to:

- Enter inventory adjustments to correct on-hand balance errors

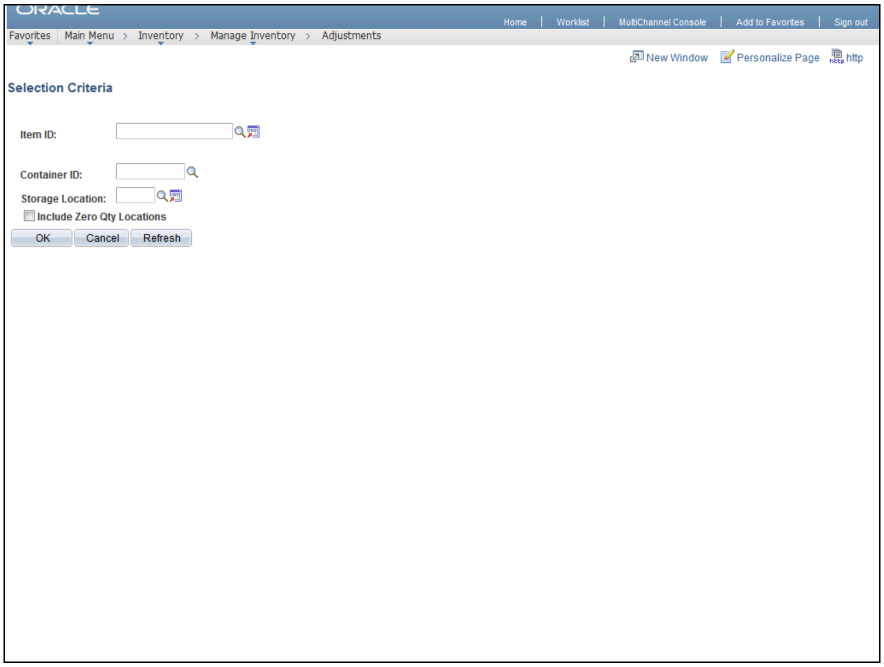
Procedure

In this topic, you will make an inventory adjustment.

Step	Action
1.	Begin by navigating to the **Adjustments** page. Click the **Main Menu** button. 
2.	Click the **Inventory** menu. 
3.	Click the **Manage Inventory** menu. 
4.	Click the **Adjustments** menu. 



Step	Action
5.	Click the **Search/Add** link. Search/Add



Step	Action
6.	The **Selection Criteria** page displays. Enter the desired information into the **Item ID** field. Enter "**adr003**".
7.	Click the **OK** button. OK
8.	Click the **Adjustment Type** list to see all of the types of adjustments that can be made.
9.	Select from the options depending upon the type of adjustment that you want to do. Click the **Decrease** list item. Decrease
10.	Enter the desired information into the **Adjust Quantity** field. Enter the quantity that you want to adjust the on-hand balance by. If you wanted to decrease the on-hand by 5 PK, then you would enter 5 in the Adjust Quantity field.
11.	Click the **Save** button. Save
12.	You have successfully completed the *Making Inventory Adjustments* topic. You have learned how to: - Make adjustments to your inventory **End of Procedure.**

Lesson 5: Using Delivered Reports

Lesson Overview:
GEARS provides a series of delivered reports that can be used to monitor the system as well as inventory activity within the system.

In order to use these reports, a run control record must be created. The run control record contains the parameters against which the program that creates the report runs. A new run control record can be created each time a report is generated or the person who requests the report can use a run control that has been saved.

Run Control IDs are unique to a specific user. In other words, multiple users cannot share a common Run Control ID.

In addition to these delivered reports, the GEARS system allows users to use on-line pages to access Inventory data. Those methods are covered in the INV200 Course.

Lesson Objectives:
After completing this lesson you will be able to:

- Understand which Inventory related reports are available within GEARS.
- Understand how to interpret the data that is shown on each report.
- Produce delivered reports.

5.1 Using Inventory Balances Report

This session will describe the delivered GEARS Inventory Balances Report.

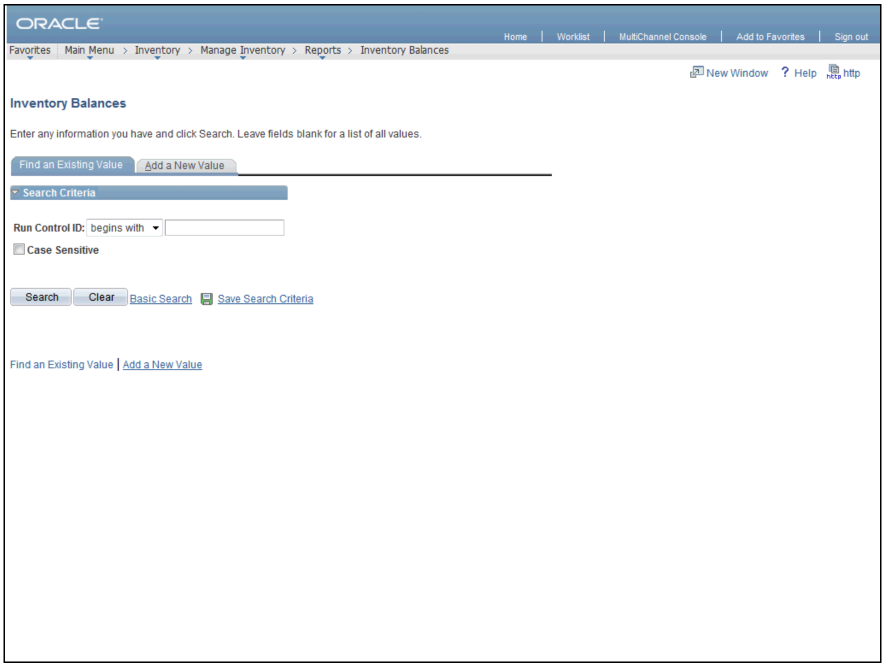
After completing this topic, you will be able to:

- Use and navigate the Inventory Balances Report

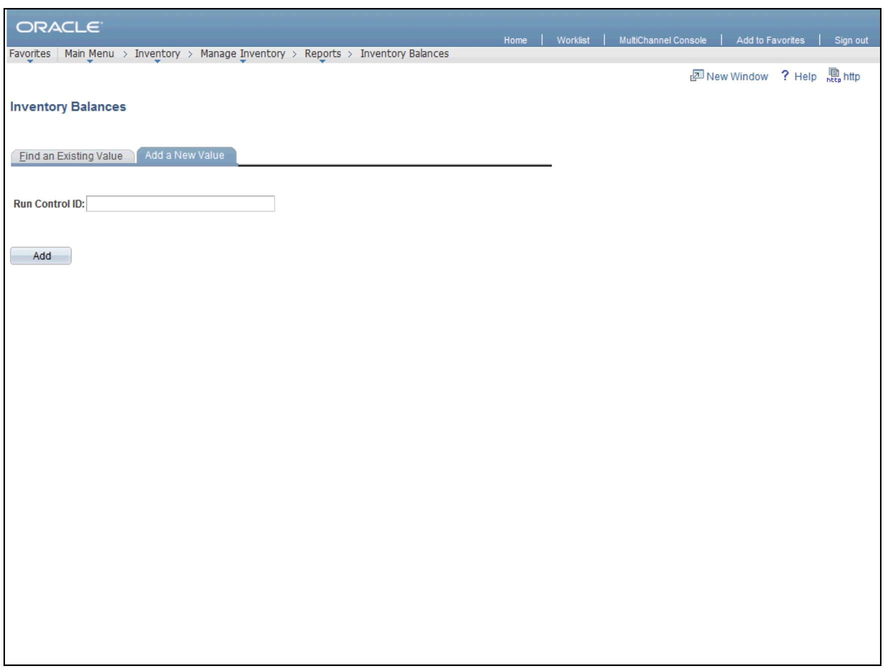
Procedure

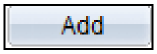
In this topic, you will learn how to use and navigate the Inventory Balances Report.

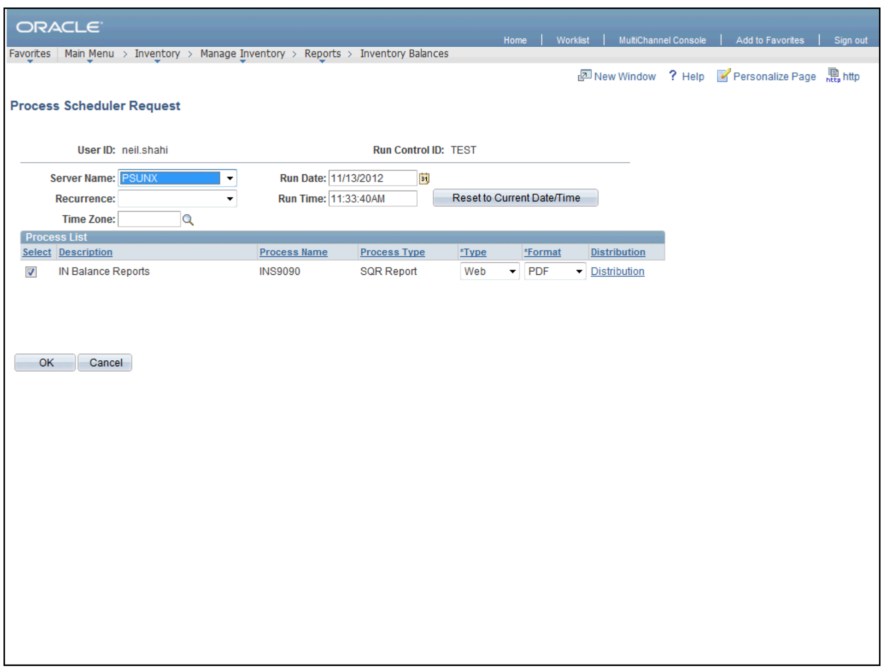
Step	Action
1.	Begin by navigating to the **Inventory Balances** page. Click the **Main Menu** button. Main Menu
2.	Click the **Inventory** menu. Inventory
3.	Click the **Manage Inventory** menu. Manage Inventory
4.	Click the **Reports** menu. Reports
5.	Click the **Inventory Balances** menu. Inventory Balances

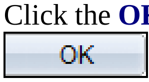


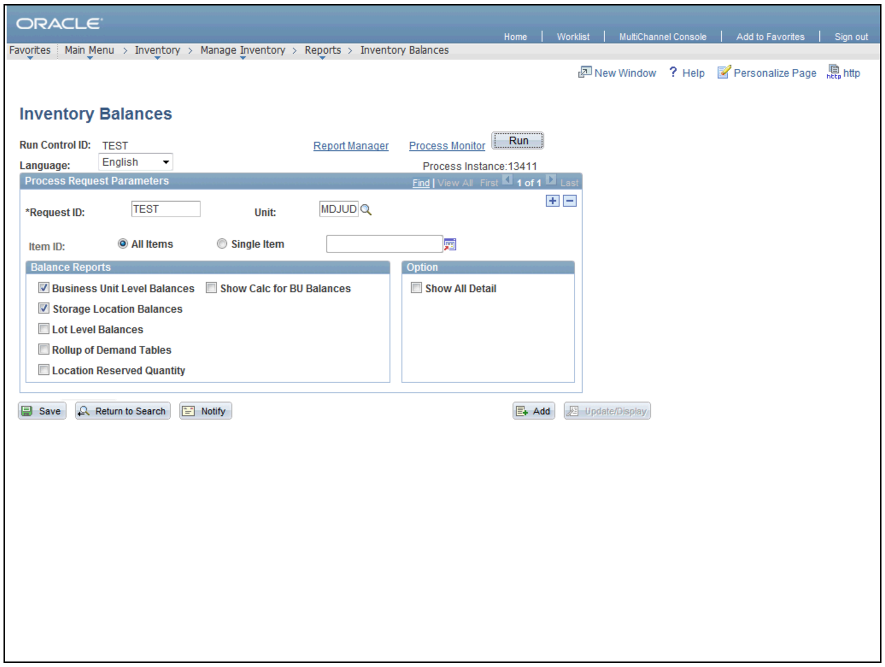
Step	Action
6.	The **Inventory Balances** search page displays. Click the **Add a New Value** tab. 



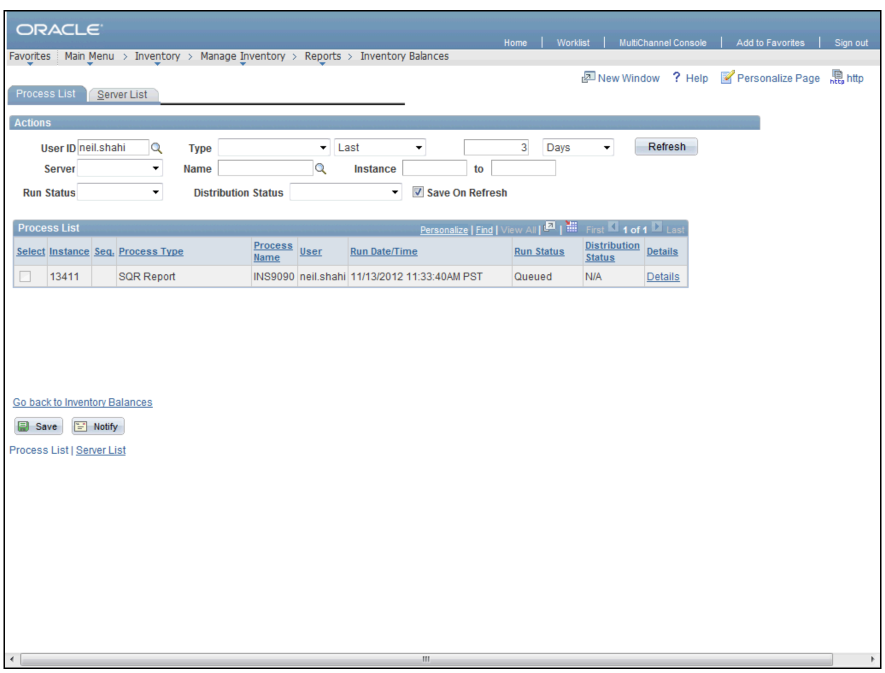
Step	Action
7.	Enter the desired information into the **Run Control ID** field. Enter "**TEST**".
8.	Click the **Add** button. 
9.	Verify that the **Unit** field displays "MDJUD".
10.	In the **Balance Reports** section, verify that the following options are selected: - Business Unit Level Balances - Storage Location Balances
11.	Click the **Save** button. 
12.	Click the **Run** button. 



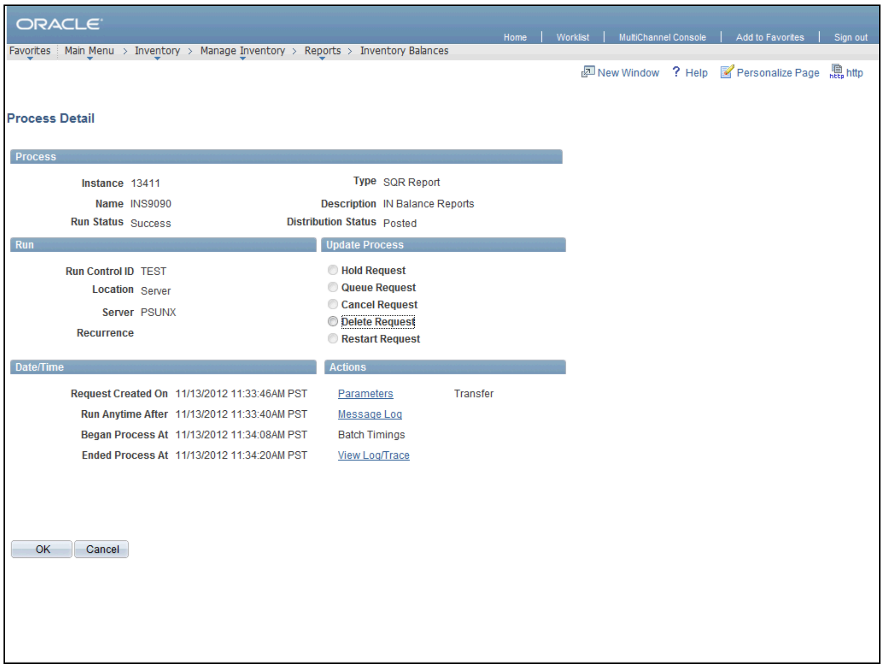
Step	Action
13.	The **Process Scheduler Request** page displays. Verify that the **Server Name** field displays "PSUNX".
14.	Click the **OK** button. 
15.	Take note of the Process Instance number. For example, 13411.



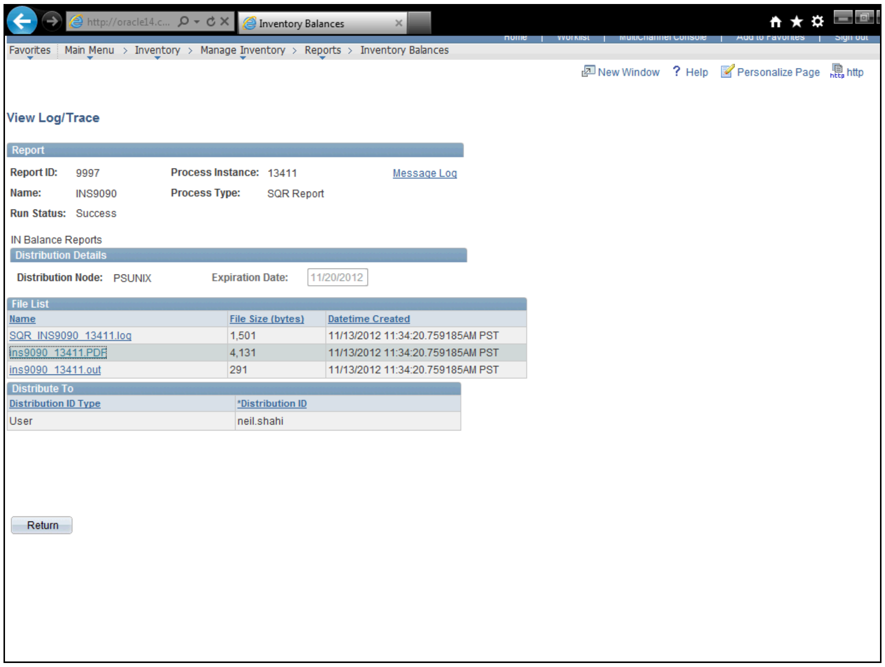
Step	Action
16.	Click the **Process Monitor** link. Process Monitor



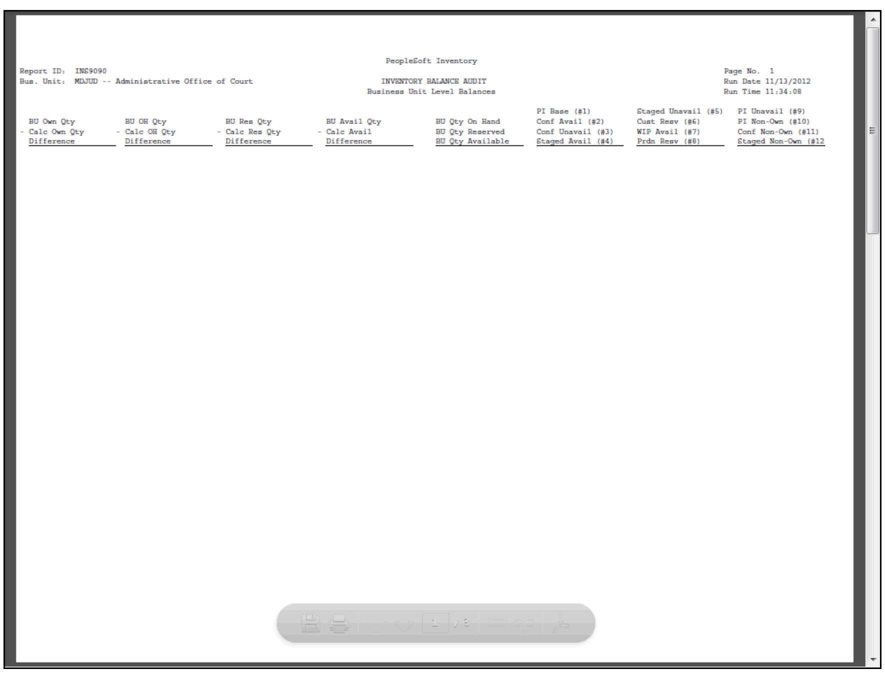
Step	Action
17.	Click the **Refresh** button until the **Run Status** is "Success" and the **Distribution Status** is "Posted" for the process you just ran. Refresh
18.	Click the **Details** link. Details



Step	Action
19.	Click the **View Log/Trace** link. View Log/Trace



Step	Action
20.	Click the **PDF** link to open the Inventory Balances report. ins9090_13411.PDF



Step	Action
21.	The PDF report output will show the inventory quantity balances of all items in the warehouse.
22.	You have successfully completed the *Using Inventory Balances Report* topic. You have learned how to: - Use and navigate to the Inventory Balances Report **End of Procedure.**

5.2 Using Issue History Reports

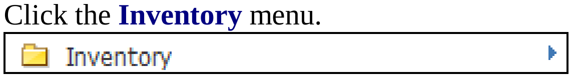
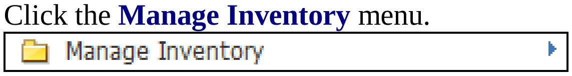
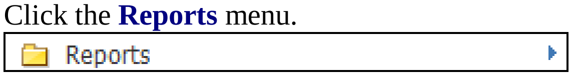
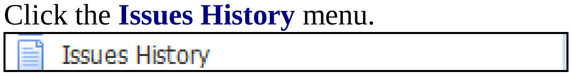
This session will describe how to access the Issues History Report.

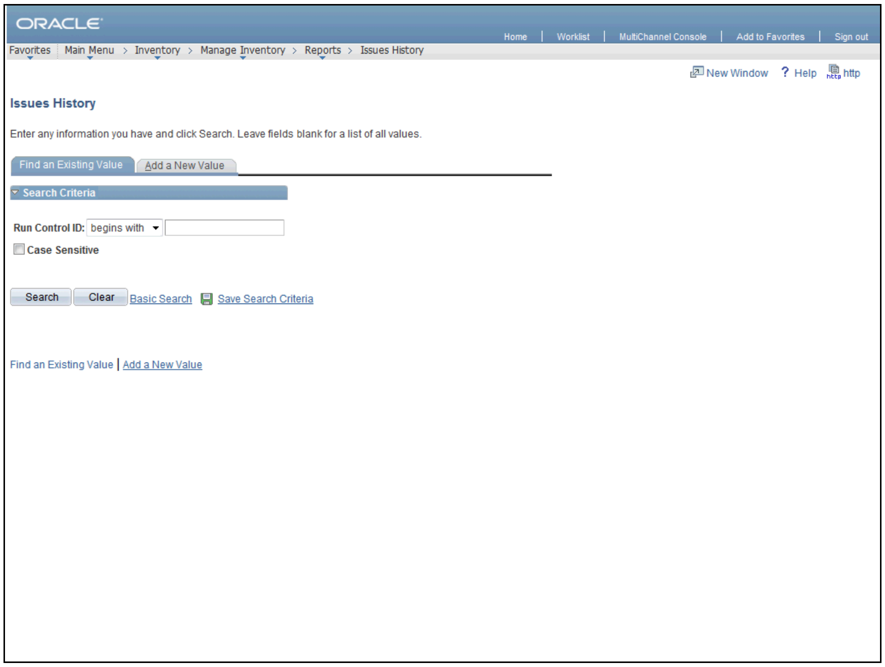
After completing this topic, you will be able to:

- Use and navigate the Issues History Report

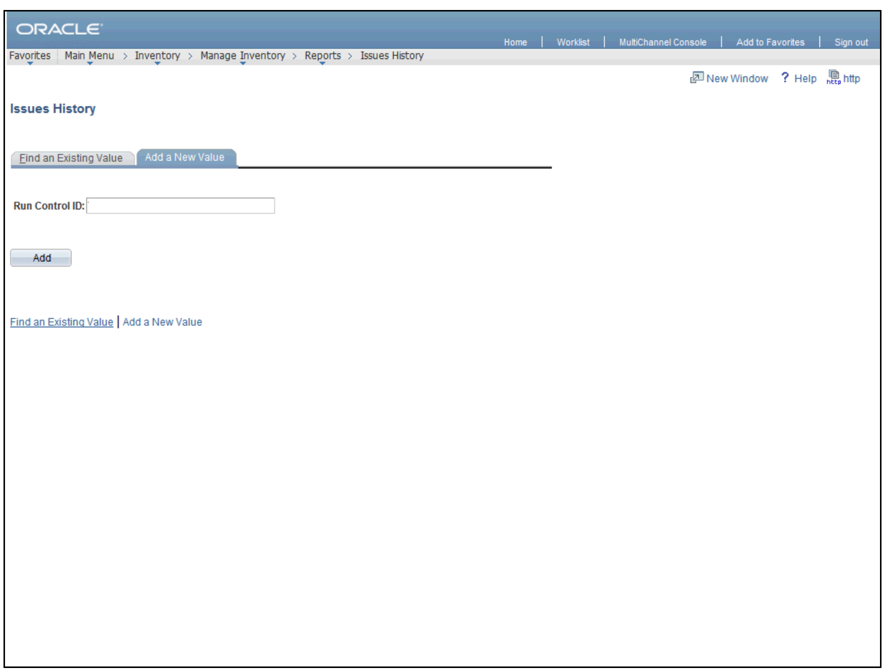
Procedure

In this topic you will learn how to use and navigate the Issues History report.

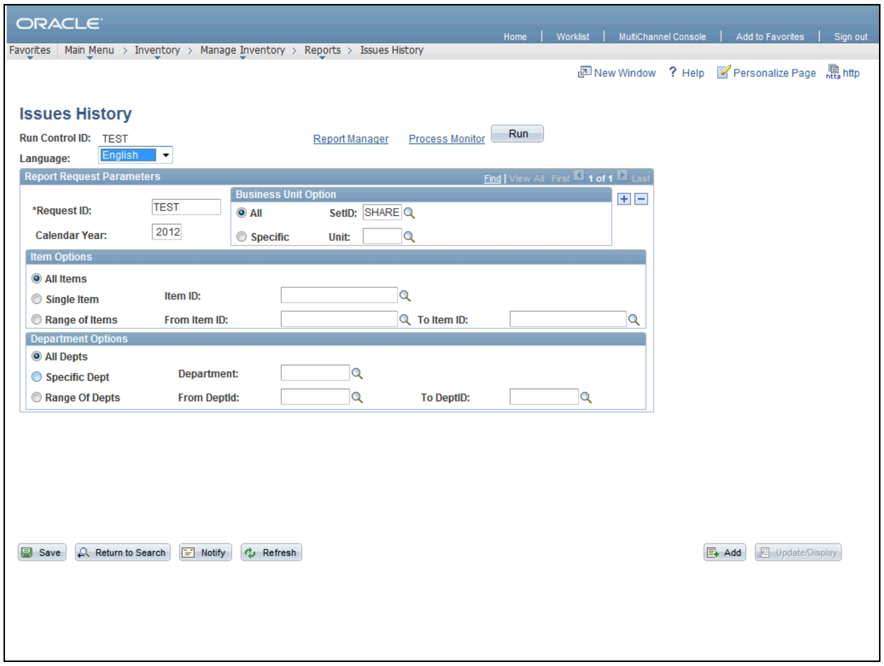
Step	Action
1.	Begin by navigating to the **Issues History** page. Click the **Main Menu** button. 
2.	Click the **Inventory** menu. 
3.	Click the **Manage Inventory** menu. 
4.	Click the **Reports** menu. 
5.	Click the **Issues History** menu. 



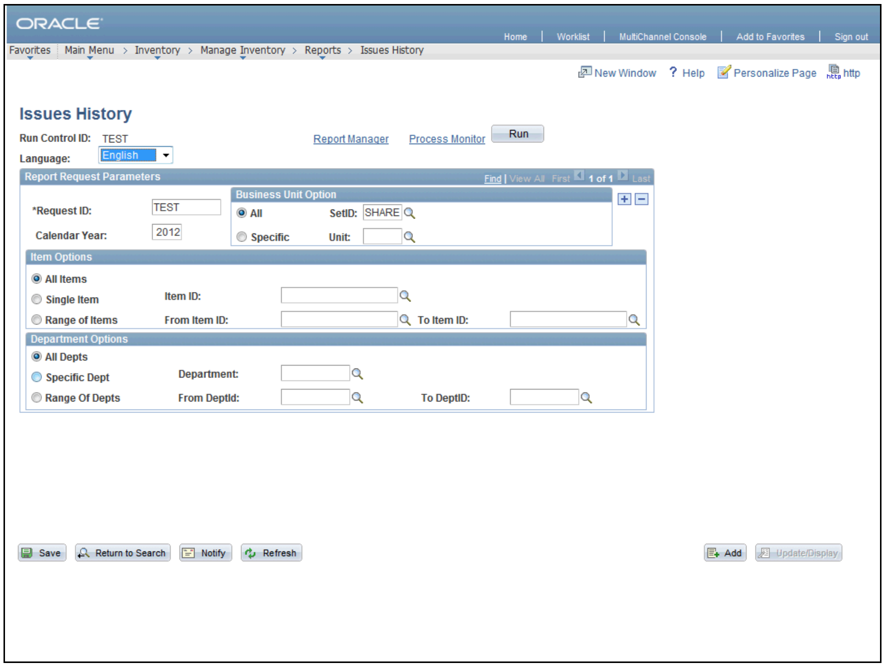
Step	Action
6.	The **Issues History** search page displays. Click the **Add a New Value** tab. 

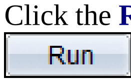


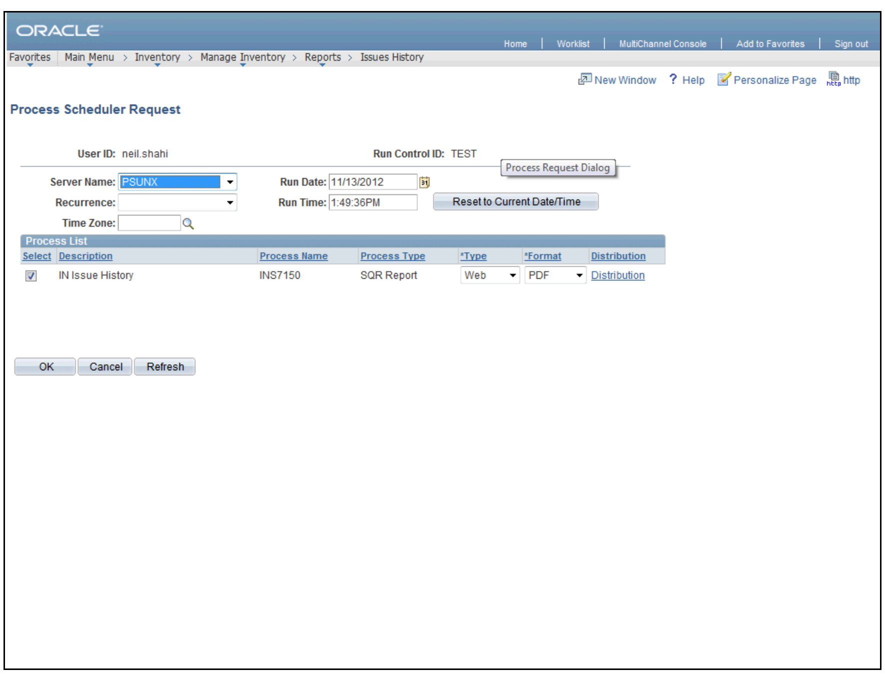
Step	Action
7.	Enter the desired information into the **Run Control ID** field. Enter "**TEST**".
8.	Click the **Add** button. Add



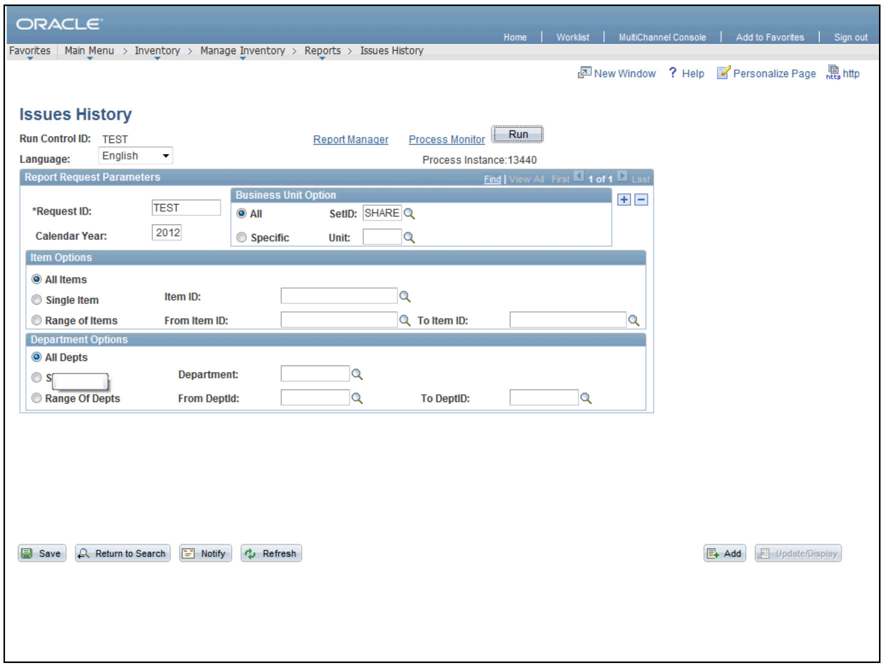
Step	Action
9.	The **Issues History** page displays. For this example, accept all run control defaults.



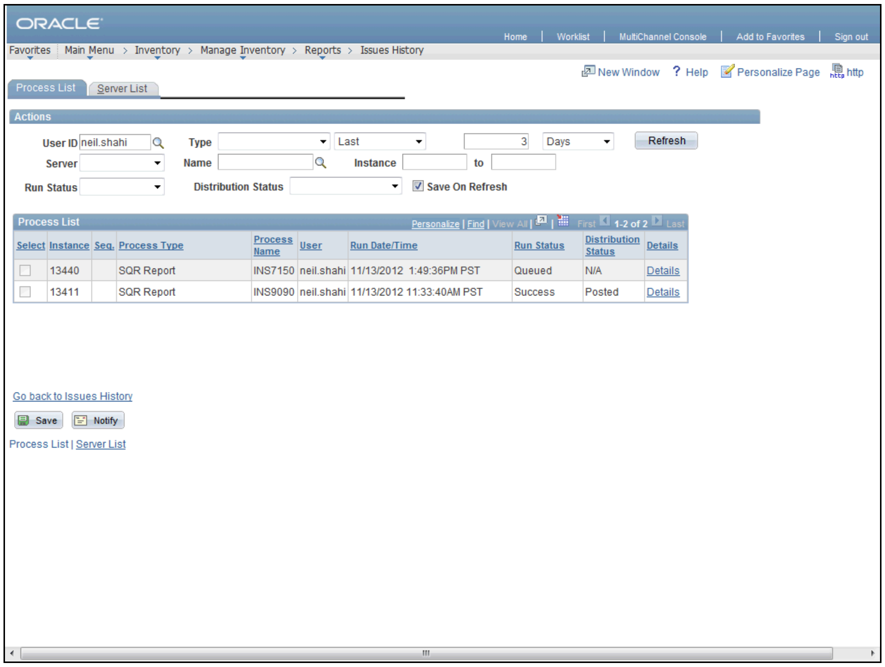
Step	Action
10.	Click the **Run** button. 
11.	The **Process Scheduler Request** page displays. Verify that the Server Name filed displays "PSUNX".



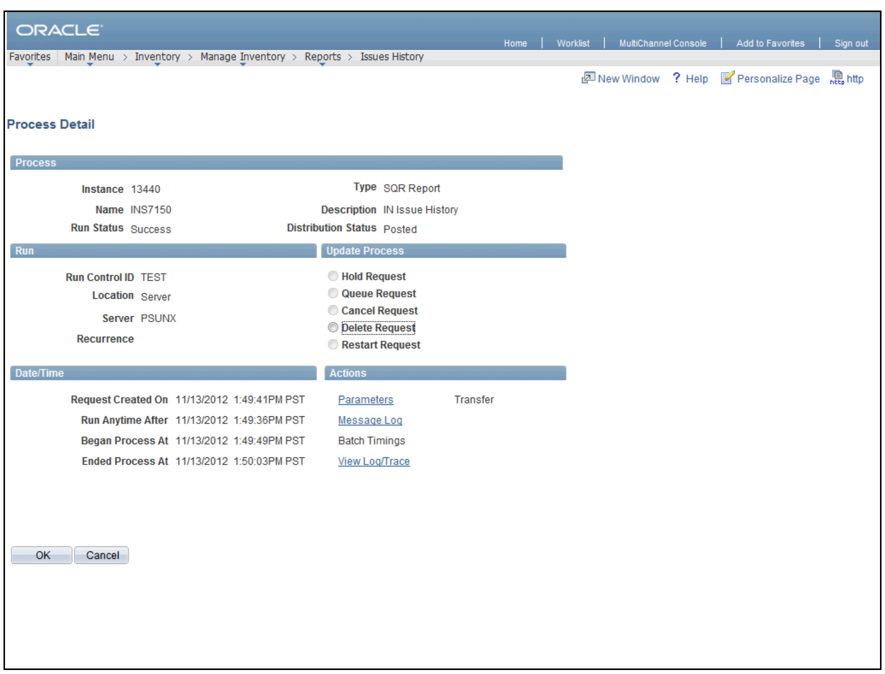
Step	Action
12.	Click the **OK** button. OK



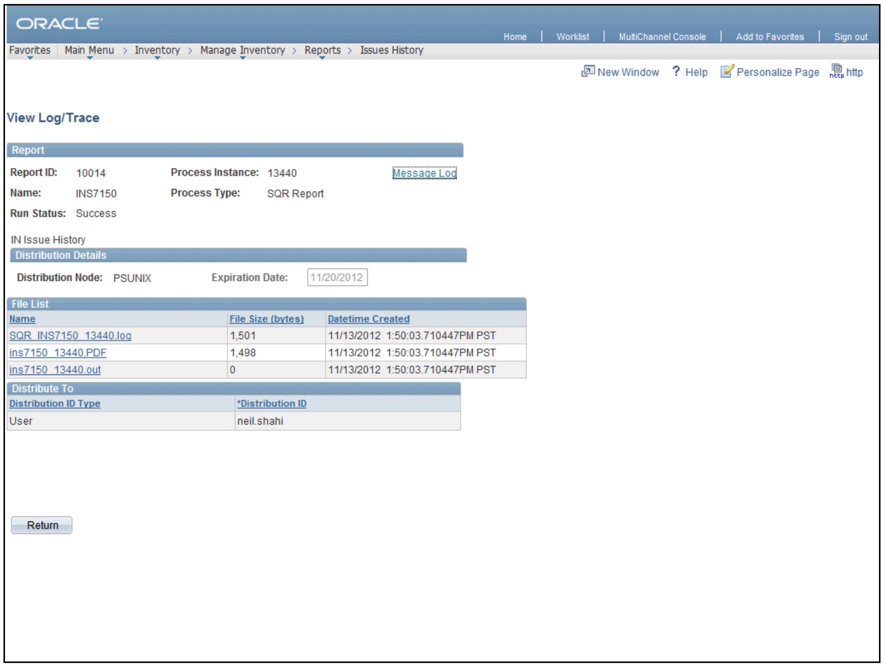
Step	Action
13.	Take note of the Process Instance number. For example, 13440.
14.	Click the **Process Monitor** link. Process Monitor



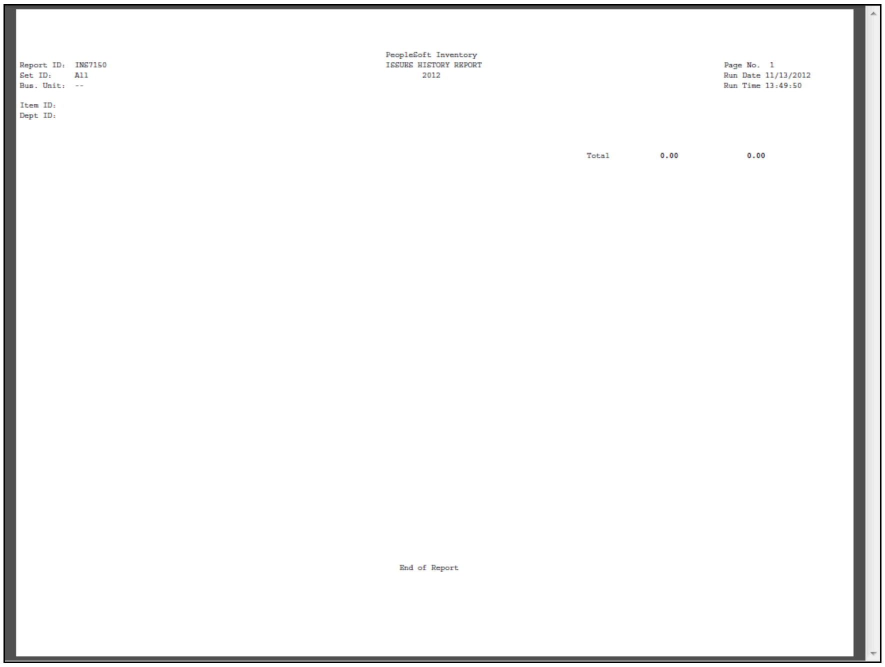
Step	Action
15.	Click the **Refresh** button until the Run Status is "Success" and the Distribution Status is "Posted" for the process you just ran. Refresh
16.	Click the **Details** link. Details



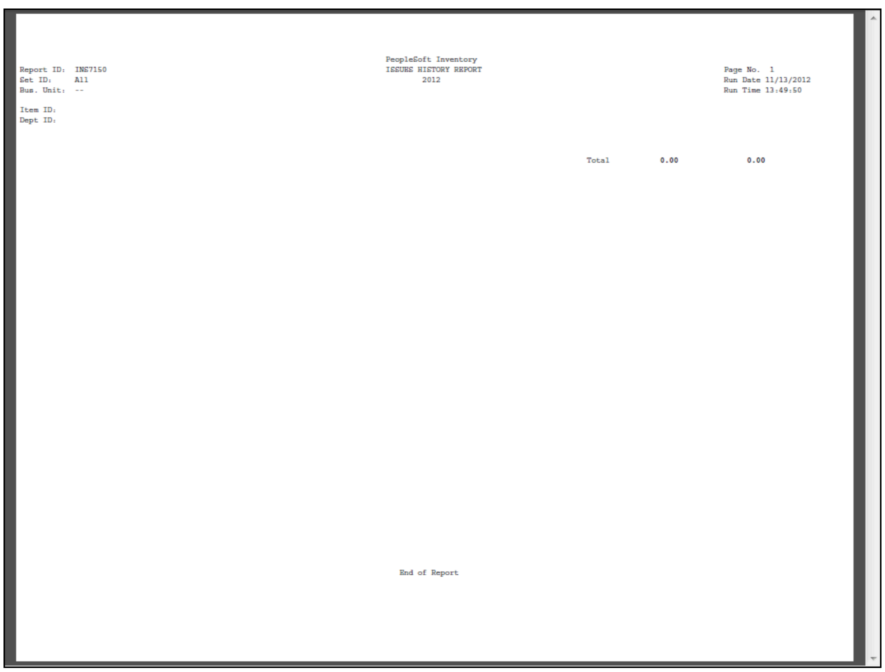
Step	Action
17.	Click the **View Log/Trace** link. View Log/Trace



Step	Action
18.	Click the PDF link to view the report output. ins7150_13440.PDF



Step	Action
19.	The **Issues History Report** opens in a new window. Click the **Close Tab (Ctrl+W)** button in the browser to close the report.



Step	Action
20.	The **Issues History Report** opens in a new window. Click the **Close** on the Windows Tab to close
21.	You have successfully completed the *Using Issue History Reports* topic. You have learned how to: - Use and navigate the Issues History report **End of Procedure.**

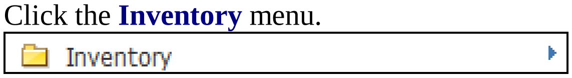
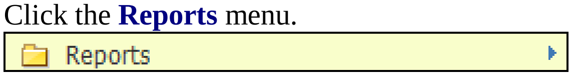
5.3 Using the Transaction Register

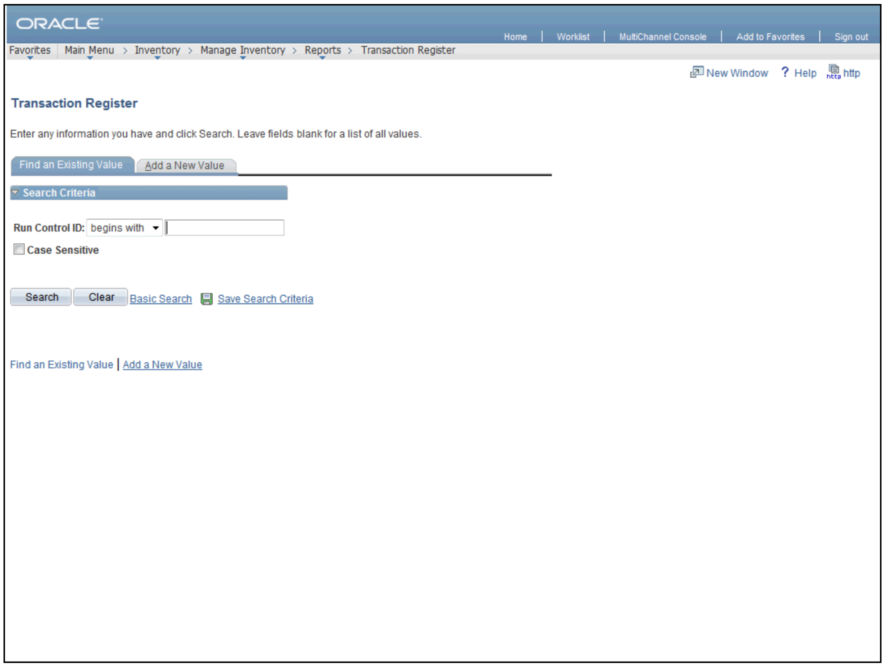
GEARS provides several methods that can be used to review transaction history. This session will describe how to access the report that was designed for that purpose.

After completing this topic, you will be able to:

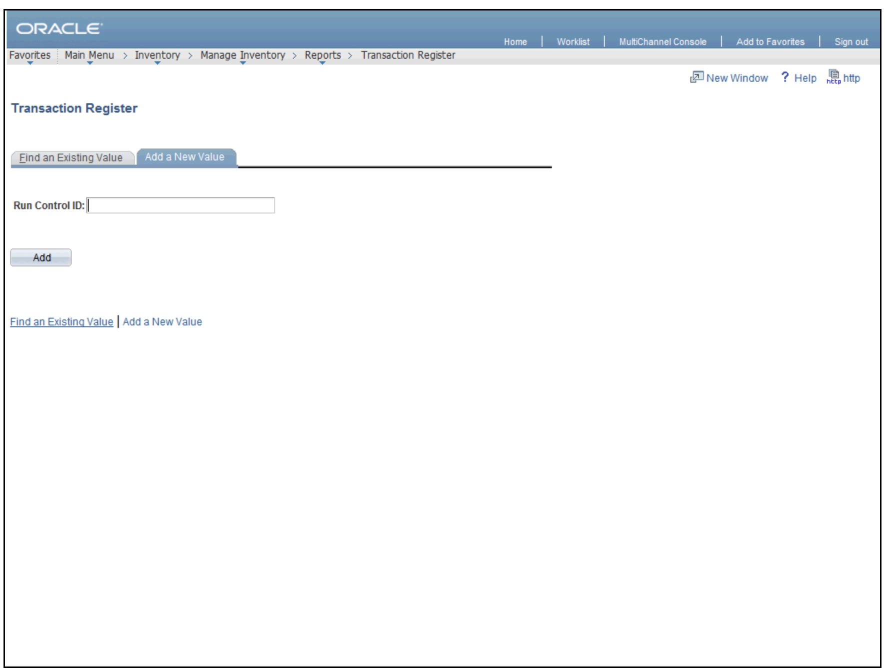
Use and navigate the Transaction Register to produce a reportProcedure

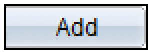
In this topic, you will learn how to use and navigate the Transaction Register to produce a report.

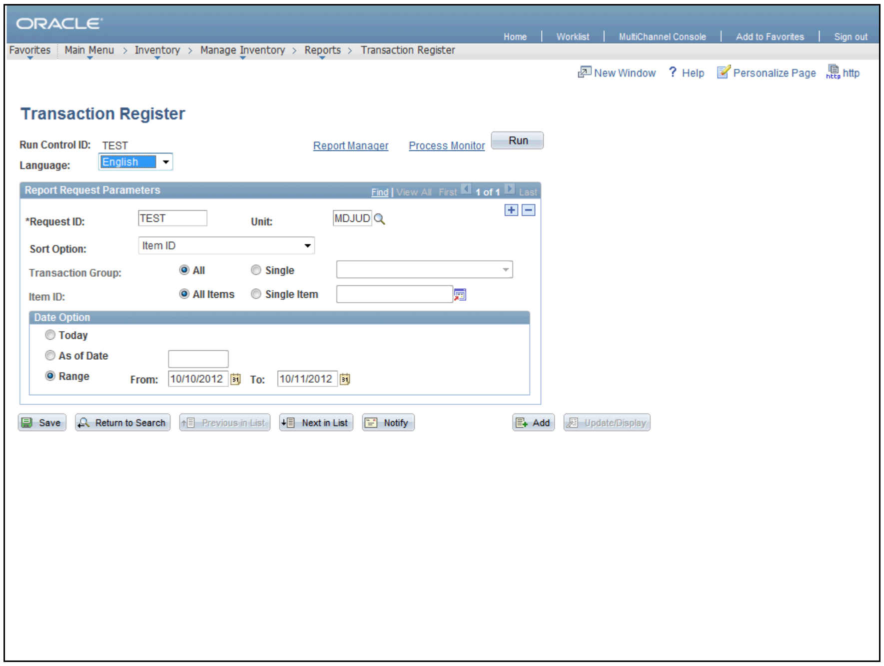
Step	Action
1.	Begin by navigating to the **Transaction Register** page. Click the **Main Menu** button. 
2.	Click the **Inventory** menu. 
3.	Click the **Manage Inventory** menu. 
4.	Click the **Reports** menu. 
5.	Click the **Transaction Register** menu. 

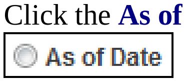
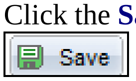
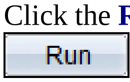


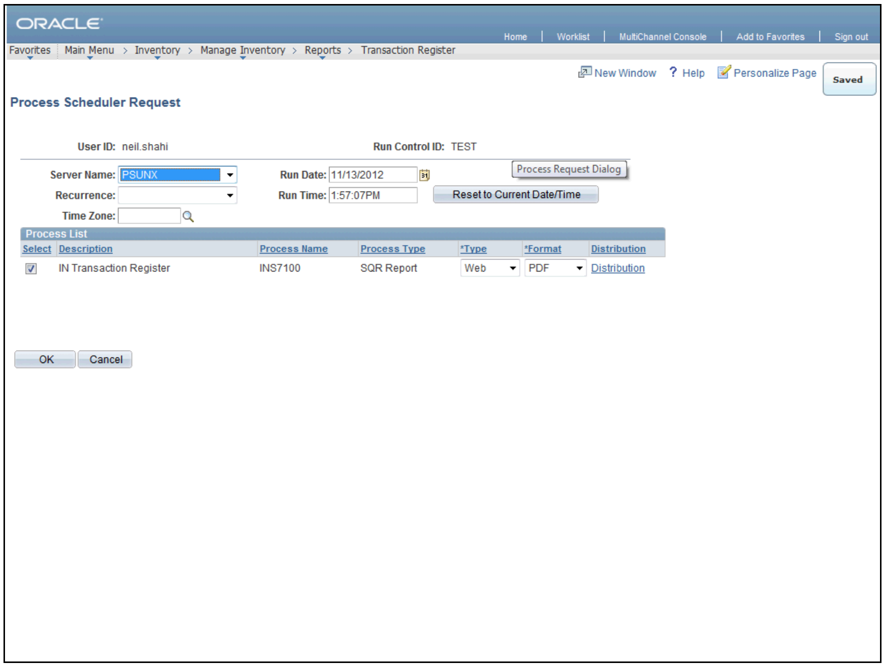
Step	Action
6.	Click the **Add a New Value** tab. Add a New Value

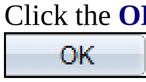


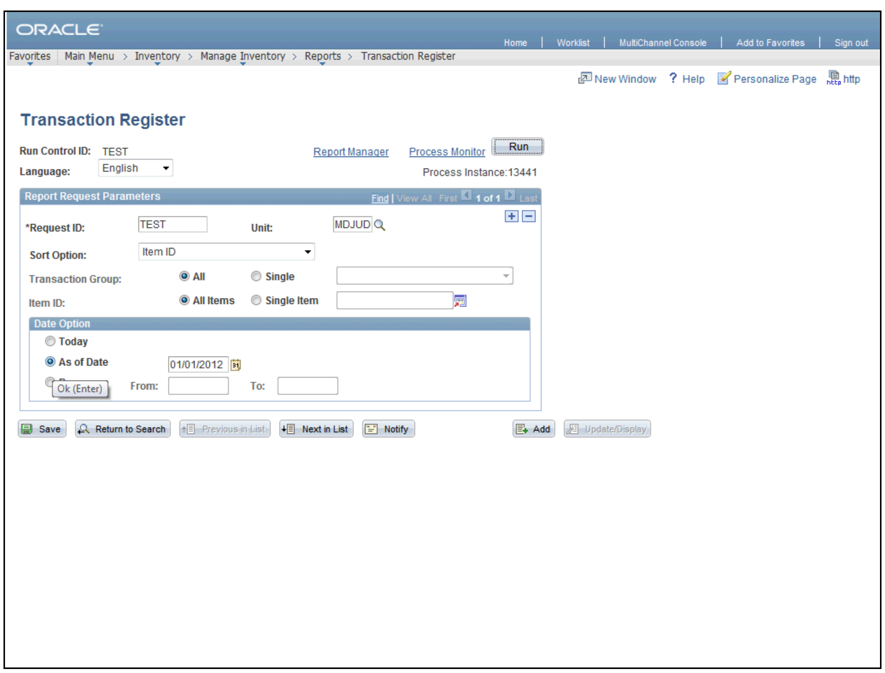
Step	Action
7.	Enter the desired information into the **Run Control ID** field. Enter "**TEST**".
8.	Click the **Add** button. 



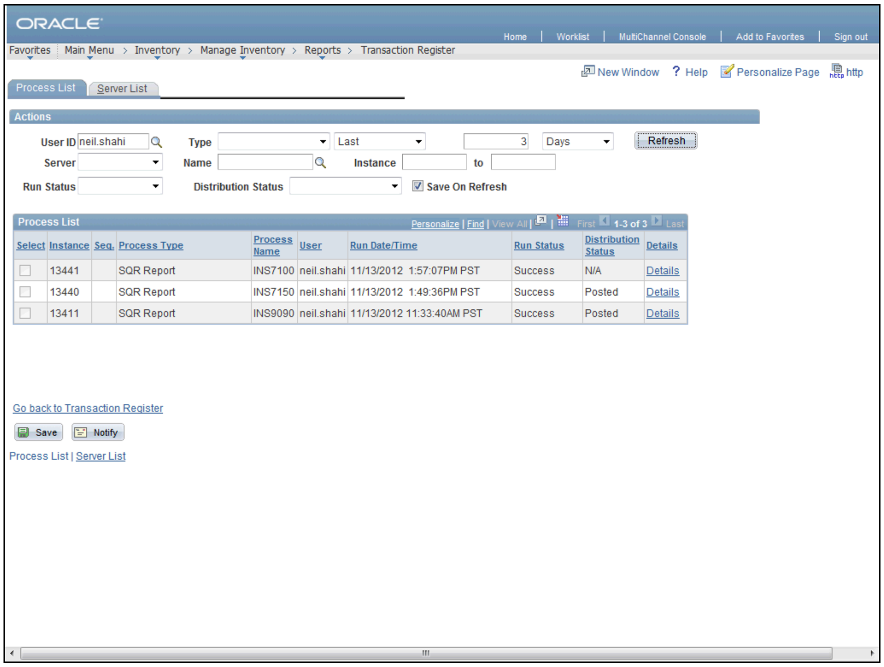
Step	Action
9.	The **Transaction Register** page displays. Click the **As of Date** option. 
10.	Enter the desired information into the **As of Date** field. Enter "**1/01/2012**" for example.
11.	Click the **Save** button. 
12.	Click the **Run** button. 
13.	The **Process Scheduler Request** page displays. Verify that the **Server Name** field displays "PSUNX".



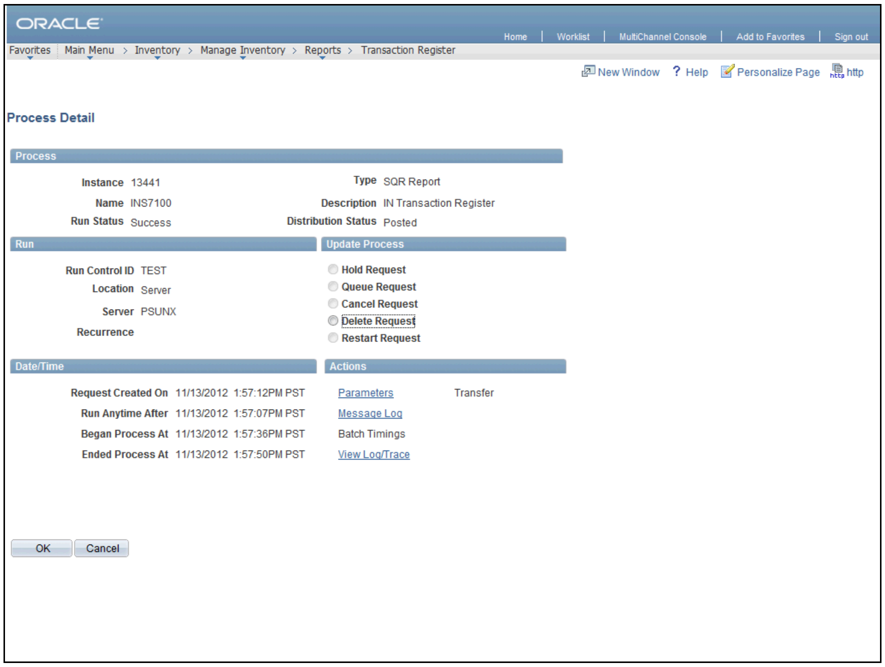
Step	Action
14.	Click the **OK** button. 
15.	Take note of the Process Instance number. For example, "Process Instance: 13441".



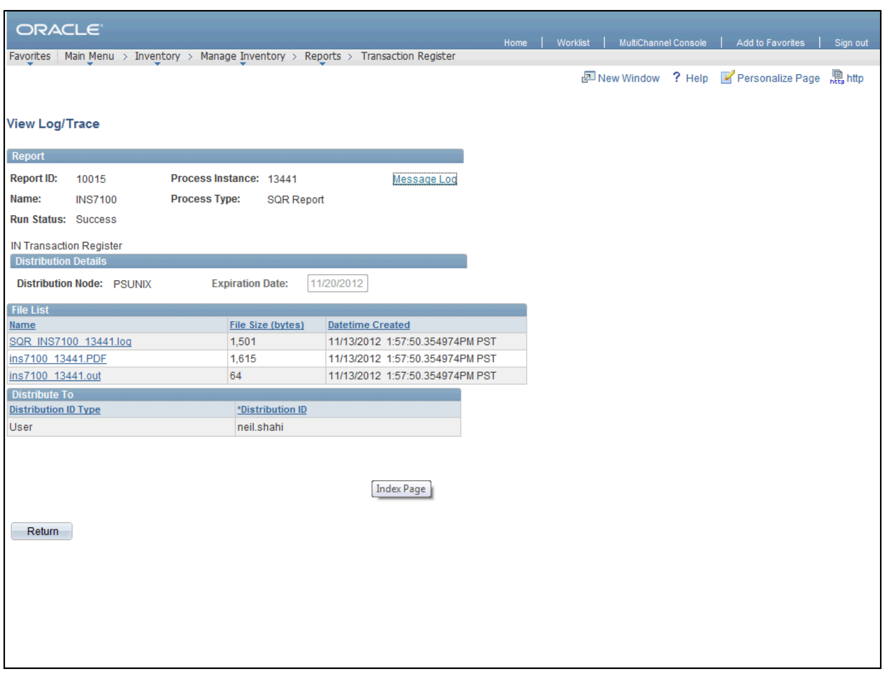
Step	Action
16.	Click the **Process Monitor** link. Process Monitor



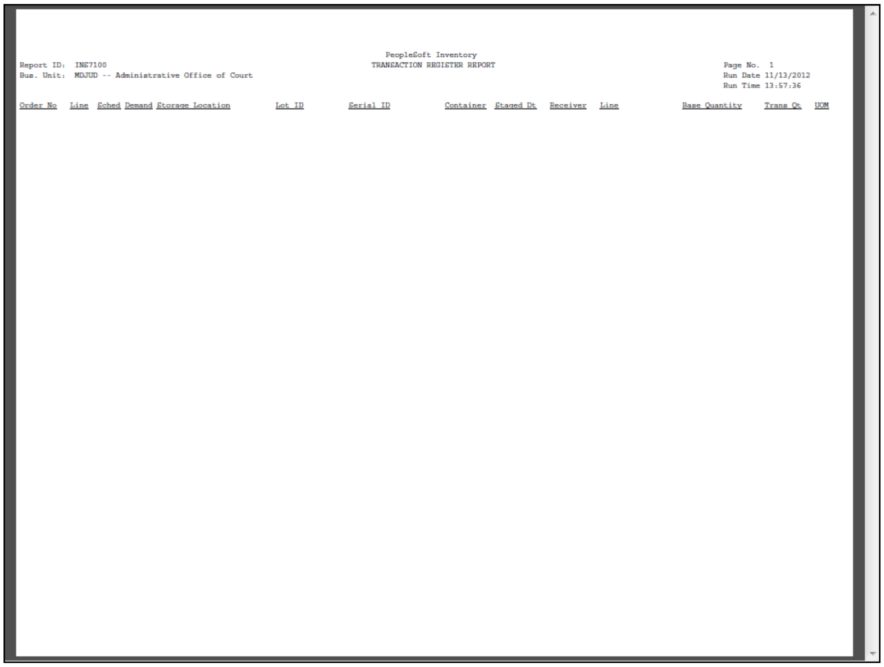
Step	Action
17.	Click the **Refresh** button until the Run Status is "Success" and the Distribution Status becomes "Posted" for the process you just ran. Refresh
18.	Click the **Details** link. Details



Step	Action
19.	Click the **View Log/Trace** link. View Log/Trace



Step	Action
20.	Click the **PDF** link to view the report output. ins7100_13441.PDF



Step	Action
21.	The **Transaction Register Report** displays in a new window.
22.	You have successfully completed the *Using the Transaction Register* topic. You have learned how to: - Use and navigate to the Transaction Register Report. **End of Procedure.**

Lesson 6: Using Replenishment Functionality

Lesson Overview:
GEARS has dynamic replenishment capabilities which can be used to great advantage at the Judiciary. There are two variables that must be set for every Item ID that is to be covered under replenishment; Order Point and Order Quantity.

When the replenishment process is executed, the process compares the current on-hand balance for all eligible replenishment items with the Order Point for the item. If the on-hand is below the Order Point, the system will create a replenishment requisition which can be reviewed and modified before a PO is created. The initial quantity on the requisition will be equal to the Order Quantity parameter in replenishment. The quantity on the requisition can be modified, the requisition can be placed on hold or the requisition can be cancelled. After the requisition has been reviewed and modified, it is submitted for further processing.

Replenishment covers two basic types of items. The first type is purchased from external vendors. The second type is printed in the in-house print shop. The system can be setup in such a way that one type of requisition is produced at a time.

An important consideration is that the replenishment process will not generate a replenishment requisition for any item that has requisitions in the Purchasing Department awaiting processing or for any item that has a remaining quantity due on any PO.

Lesson Objectives:
After completing this lesson, you will be able to:

- Understand the replenishment process in GEARS
- Set/reset the appropriate replenishment parameters
- Interpret the results of the replenishment process
- Manage replenishment orders

6.1 Using Replenishment Functionality

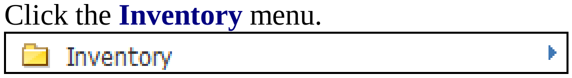
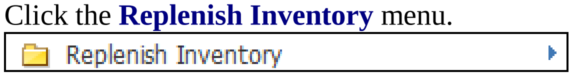
At the District Court Warehouse, we will set the Order Point and Order Quantity manually and will not allow the system to recalculate the replenishment parameters. There are two types of inventory items at the District Court Warehouse (1. Those that are provided by Vendors and 2. Those that are produced in the Print Shop). We may use a distinct replenishment class to manage each type of inventory.

After completing this topic, you will be able to:

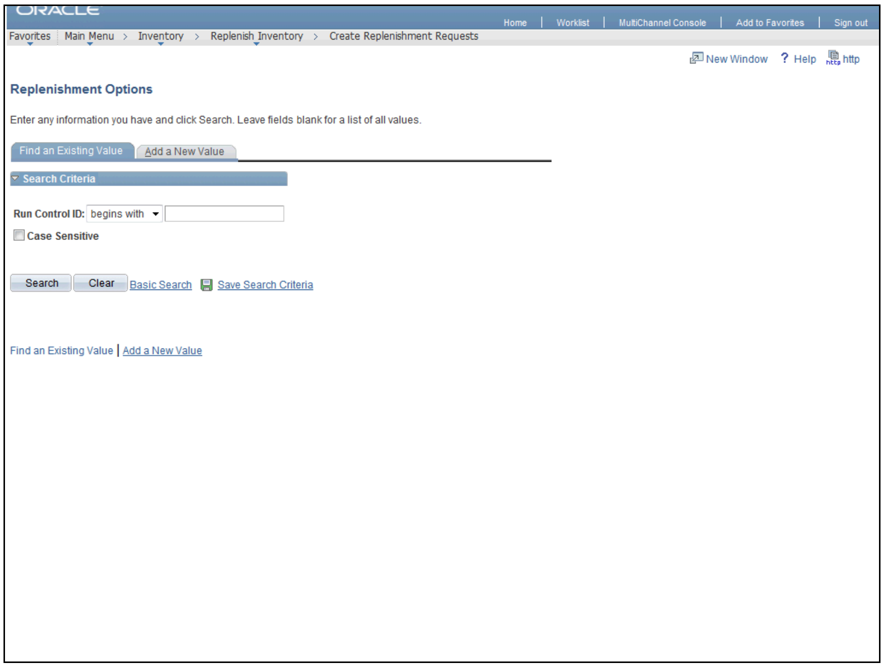
- Use the GEARS Replenishment functionality

Procedure

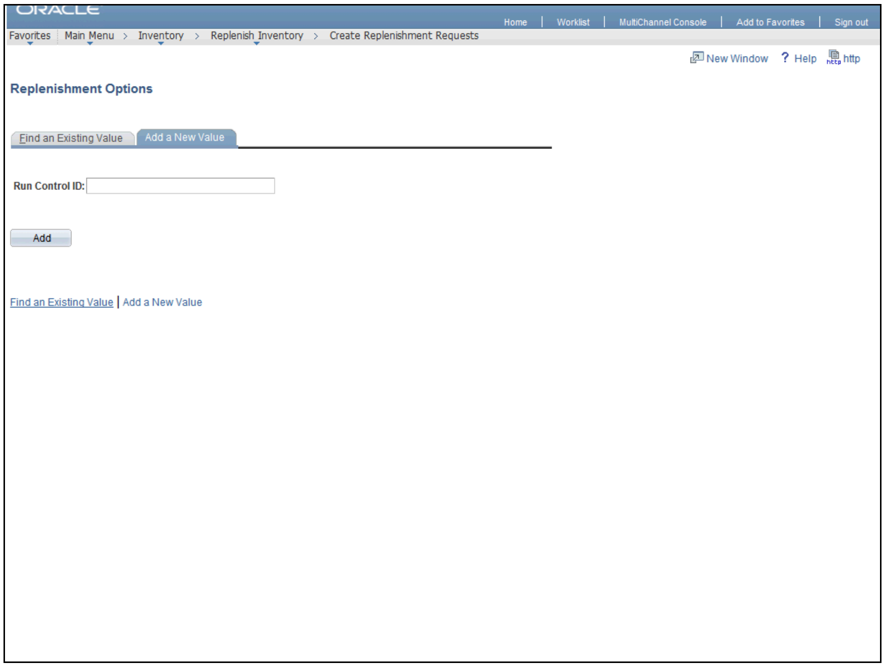
In this topic, you will explore the GEARS replenishment functionality.

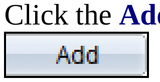
Step	Action
1.	Begin by navigating to the **Replenishment Options** page. Click the **Main Menu** button. 
2.	Click the **Inventory** menu. 
3.	Click the **Replenish Inventory** menu. 

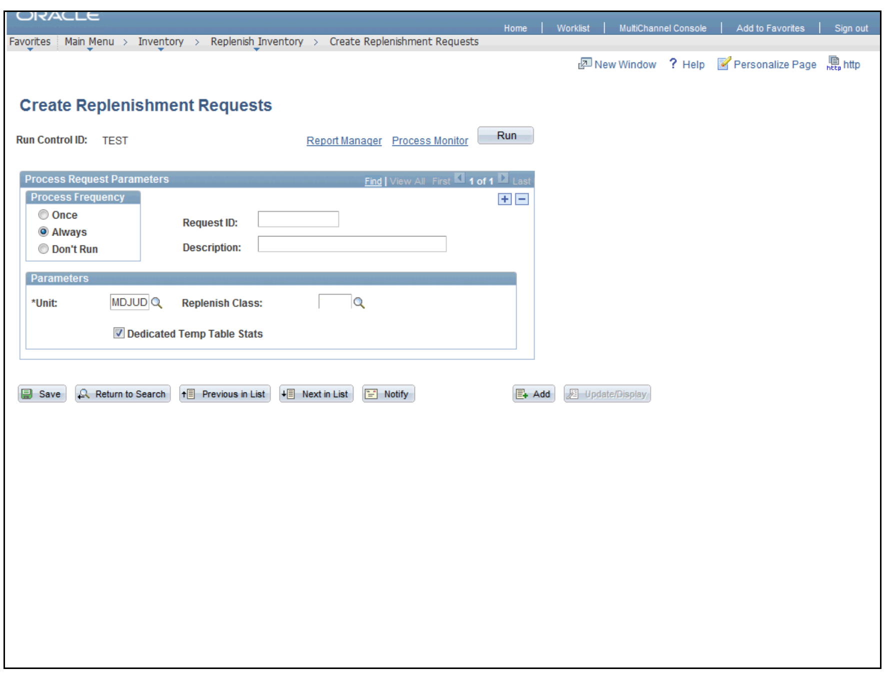
Step	Action
4.	Click the **Create Replenishment Requests** menu. 



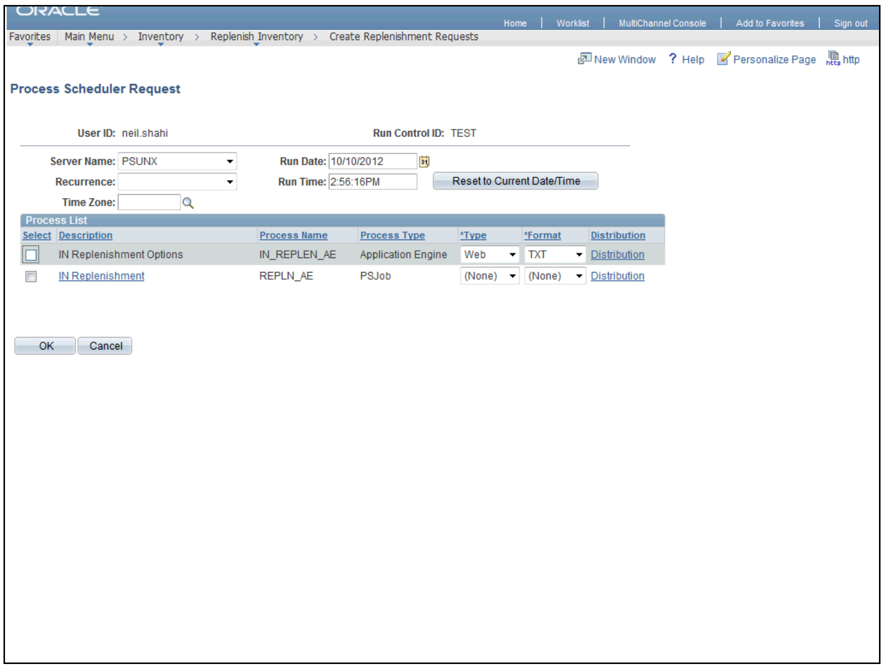
Step	Action
5.	Click the **Add a New Value** tab. 

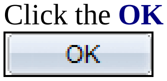


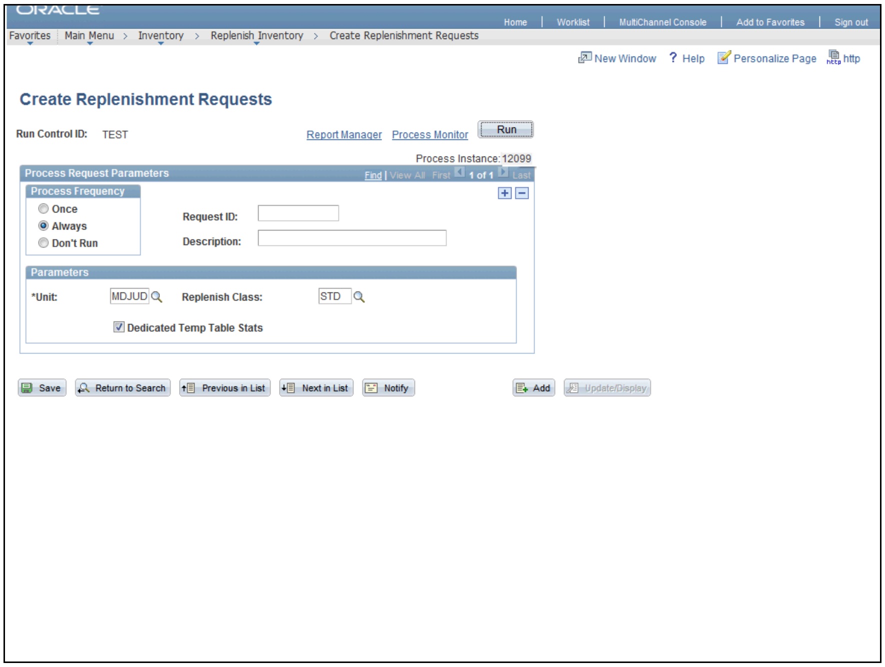
Step	Action
6.	Enter the desired information into the **Run Control ID** field. Enter "**TEST**".
7.	Click the **Add** button. 



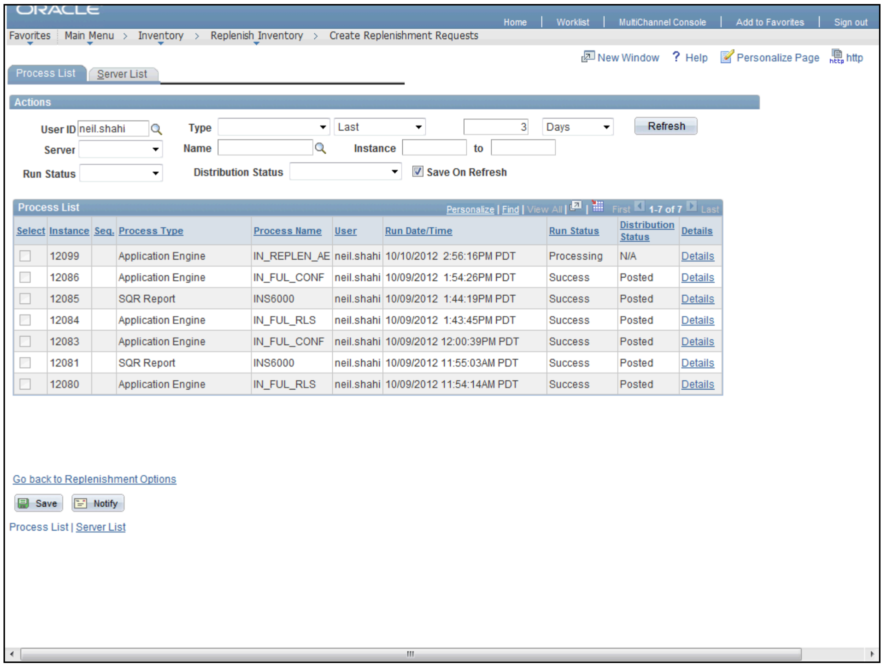
Step	Action
8.	The **Create Replenishment Requests** page displays. Enter the desired information into the **Replenish Class** field. Enter "**STD**".
9.	Click the **Run** button. 

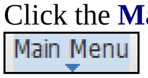
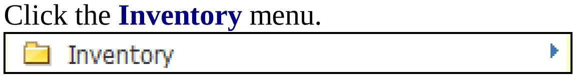
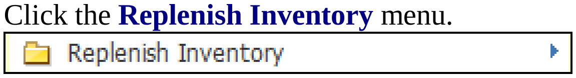


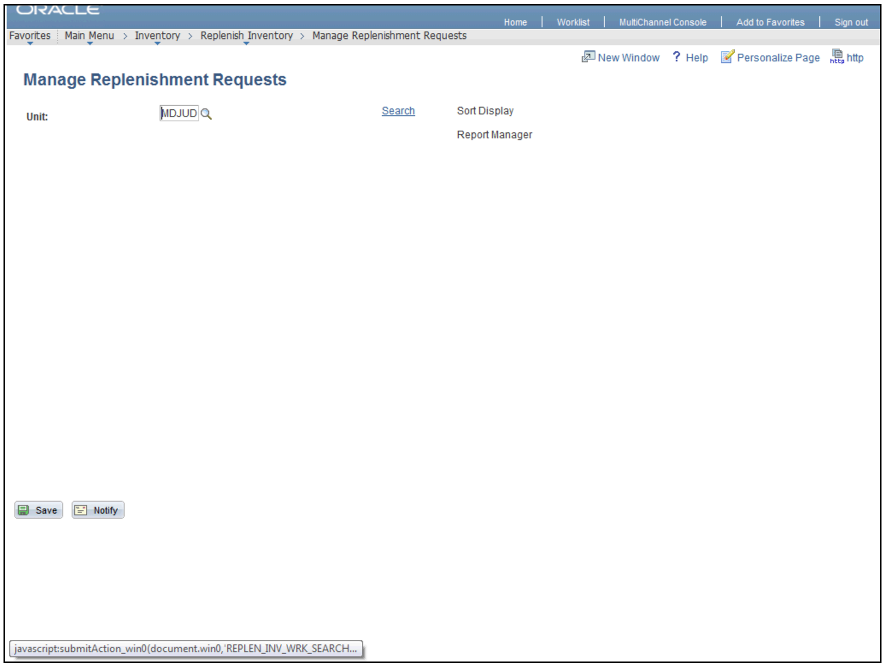
Step	Action
10.	The **Process Scheduler Request** page displays. Click the **IN Replenishment Options** process option. 
11.	Click the **OK** button. 
12.	Take note of the Process Instance number to monitor the process status. For example, Process Instance: 12099.



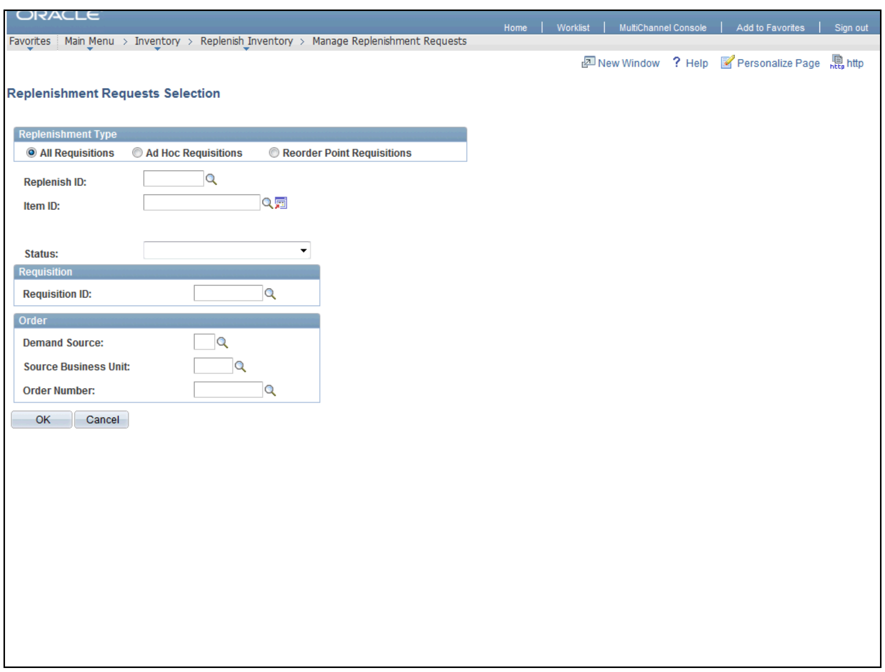
Step	Action
13.	Click the **Process Monitor** link. Process Monitor
14.	In the **Process List**, identify the process instance number for the process you just ran. Use the Process Instance number.



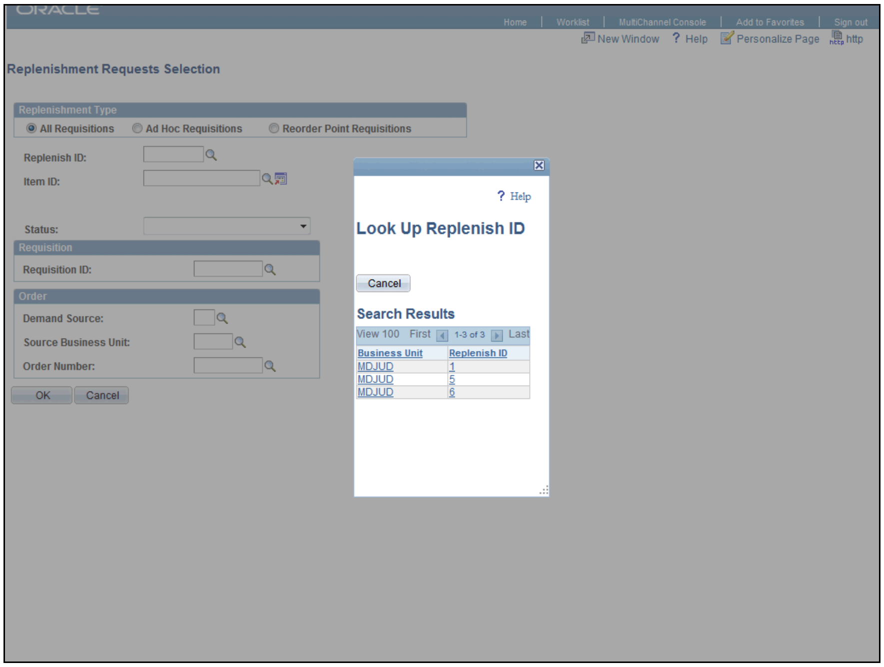
Step	Action
15.	Click the **Refresh** button periodically until the Run Status is "Success" and the Distribution Status is "Posted". 
16.	Next, review the Replenishment request created by the batch process and update quantity to be ordered.
17.	Click the **Main Menu** button. 
18.	Click the **Inventory** menu. 
19.	Click the **Replenish Inventory** menu. 
20.	Click the **Manage Replenishment Requests** menu. 



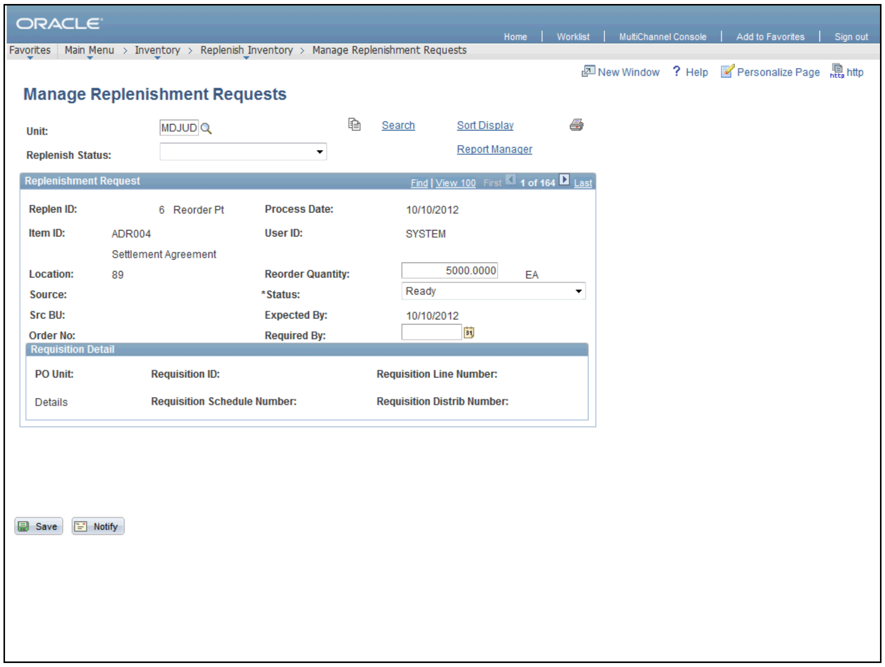
Step	Action
21.	Click the **Search** link. Search

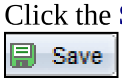


Step	Action
22.	Click the **Lookup Replenish ID** button.



Step	Action
23.	Select the largest Replenish ID row. In this example, click the **6** link. 6
24.	Click the **OK** button. OK



Step	Action
25.	The **Manage Replenishment Requests** page displays. Enter the desired information into the **Reorder Quantity** field. Enter "**4000**".
26.	Click the **Save** button. 
27.	The script is successful if it saves with the changed Reorder Quantity.
28.	You have successfully completed the *Using Replenishment Functionality* topic. You have learned how to: - Use the GEARS replenishment functionality **End of Procedure.**

Course Summary

Congratulations!
You have successfully completed the *INV210 Managing Inventory* course. In this course, you have learned how to:

- Create and Update Bin Locations
- Stock Material

- Use Express Issue
- Make Inventory Adjustments
- Use Reports
- Use the Replenishment Functionality

We hope that you found this class informative, interactive, and fun. Check out other GEARS training courses, available on the GEARS website at http://courtnet/gears/index.html (http://courtnet/gears/index.html).

We are always looking for opportunities to improve our courses. If you have ideas on improving this course please share your feedback by sending us an email at gearstraining@mdcourts.gov (mailto:gears@mdcourts.gov).